



collins group
a division of
Campbell & Company

The Art of Donor Conversations

Washington Planned Giving Council
March 14, 2016

BECAUSE **YOUR MISSION** MATTERS

What we'll cover today

Donor Conversation Defined

Personal Mission Statements

Tactics and Pivot Points

Petting the Whale

Thoughts and Questions



Who am I?

Collins Group since 2011

Development positions at:

PLU (11 years)

Charles Wright Academy (5 years)

Franciscan Health System (9 years)

Started as journalist

NOT a planned giving expert



Why This Topic is Important

Humans crave to be heard

Effective listening is a skill

Connection trumps strategy

Our profession is awash in jargon



A Donor-Centered Conversation

A conversation, not a presentation

Forming an emotional connection

Learning donor's personal mission statement



A Personal Mission Statement

Everyone has one

Do you know yours?

Do you know your donors'?



Mission statement components

Life story orientation

Values orientation

Family?
Success?
Community?

Sense of calling or duty

Higher purpose



One donor's story: Kurt Mayer



(1930-2012)



Kurt's life story

Immigrant

German Jew

Holocaust Survivor

Self-made man



Kurt's mission statement

"Never again"

Religious/political tolerance

Guard against tyranny

America is land of opportunity



Philanthropic expression

Kurt Mayer Chair in Holocaust Studies at PLU

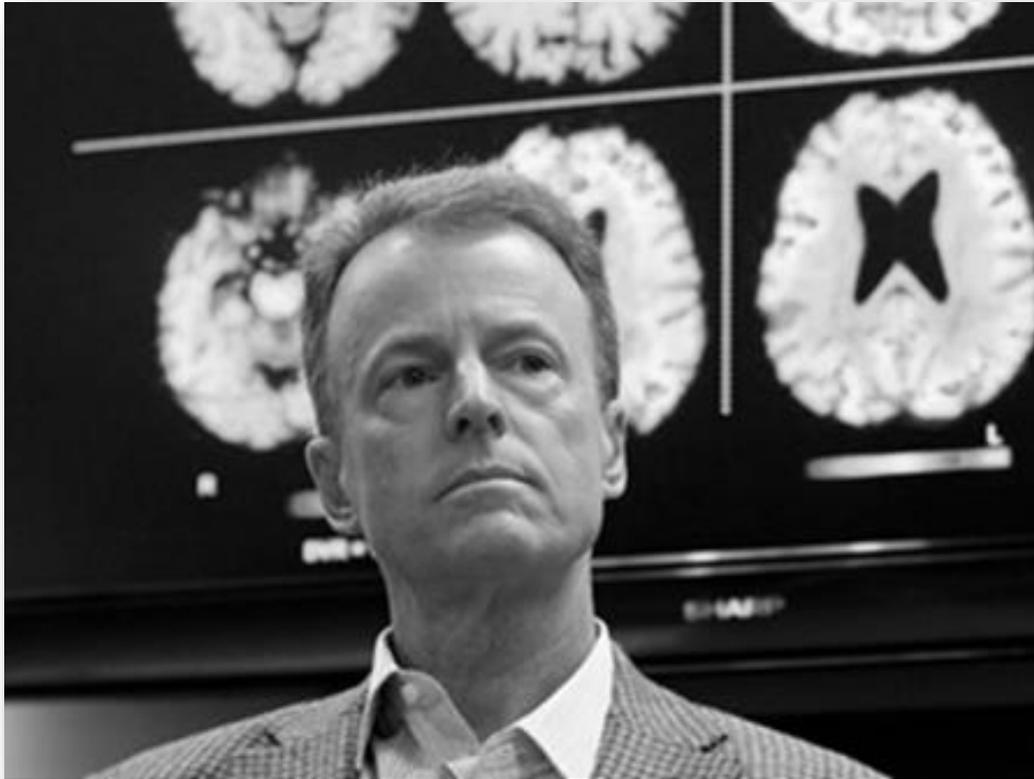
Alignment with personal mission

Faith in Professor Bob Erickson

**Location at
Christian university**



Another donor's story: Tom Ellison



Family Business: Value Village

\$50M Family Fdn

Lost 3 family members
to Alzheimer's



Tom's mission statement

*“I and my family
have had entirely
too much
experience with
this disease”*

*Seattle Times
March 29, 2015*



Tom's philanthropic response

Health Local News

\$6M Ellison Foundation gift to launch new UW Alzheimer's project



A Bellevue family that lost three members to Alzheimer's disease has donated \$6 million to the University of Washington to focus on new research, diagnosis and potential treatments.

By JoNe Alecci

A Bellevue family that lost three members to Alzheimer's disease has donated



Inferences. . .

Think of giving as a philanthropic response

Response draws heavily from life experience

Use research to uncover personal mission statement

Philanthropy = emotional impulse wrapped in a logical response

Emotion = deep felt value

Response = using \$\$\$ to address it

Pas de jargon

De-jargonize
yourself

Talk to people
outside your cult

Focus on function,
not label

Inventory your words

ASS-U-ME at your
peril

Russell James

Will vs. bequest

Estate plans vs.
planned giving



Watch This



Pay Attention to Certain Clues

Now vs. future

Need vs.
opportunity

What “type” is your donor prospect?

Immediate crisis
vs. long-term
benefits

Facts vs. vision

Ask open-ended questions

“What motivates you?”

“What organizations do you support; why?”

“If you could accomplish one thing through your philanthropy, what would it be?”

Find a “pet the whale” opportunity



Pet the Whale: Rebecca's story



Planning the Visit

Don't "over-prepare"

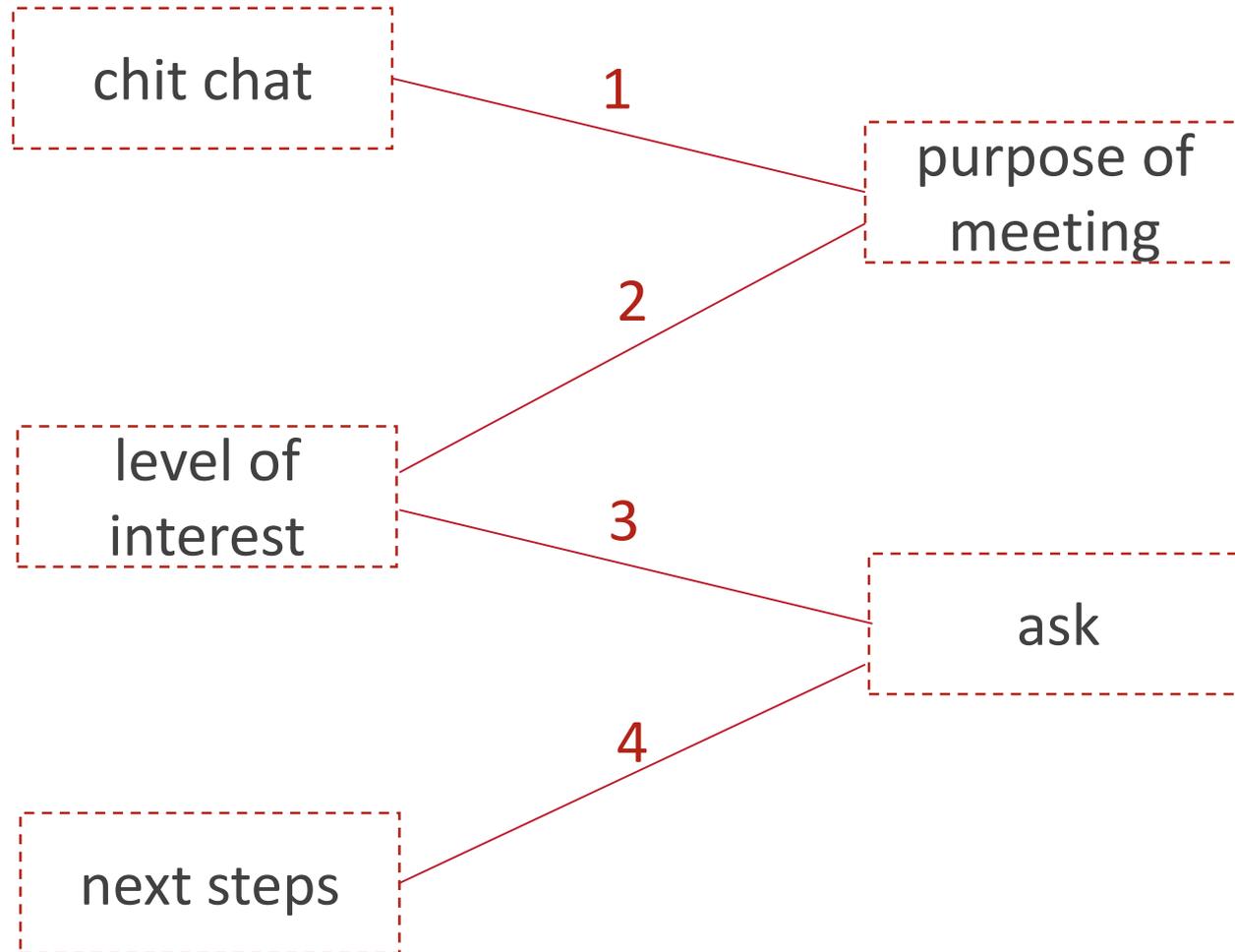
Know your minimum/
maximum goal

Follow the donor's lead

One-person vs.
two-person visits



Four pivot points



In a donor conversation

YOU are the face of
the organization

Share YOUR passion

YOU are the brand

Why are YOU
invested?

Illustrate why
in a story



Your turn!



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