
EMPOWERING

Your Board to Serve as

effective

**DEVELOPMENT
AMBASSADORS**

Marcy Heim, CFRE

Chapter 6

The Artful Asker Cycle of Successful Relationships

Fundraising consultant Douglas M. Lawson, Ph.D. is the author of several books including *Volunteering: 101 Ways You Can Improve the World and Your Life* (1998) and *Give to Live: How Giving Can Change Your Life* (1999). I have admired Mr. Lawson and his approach for years. In a 1996 article for *Fund Raising Management* magazine, Mr. Lawson defined philanthropy as:

The mystical mingling of a joyful giver, an artful asker, and a grateful recipient.

Lawson's definition of philanthropy inspired my colleague Donald Gray, Ph.D. to replace the customary words "cultivation," "solicitation," and "stewardship" on the traditional fundraising cycle.

Working with Don and his cycle over the years led me to make a few additional changes, and create my Artful Asker Cycle of Successful Relationships. My Cycle incorporates the Joyful Giver, Artful Asker, and Grateful Recipient as important steps not only in the development process, but also in life.

As I said earlier, in my own experience, I believe that more than 85 percent of the success I have experienced is because of my mindset about development work and philanthropy more than the methods or specific metrics I've employed.

I believe that the words we use speak volumes about how we feel about ourselves, our prospective givers, our causes, and our lives, and that we communicate this energy to others.

In each step of the Cycle, there are both artful and metric-based ways of attracting major donors to our cause.

There are also sections of the Cycle where board members, volunteers, and faculty can play a large role to support staff and help create the overall relationships with major donors. Let's go around the Cycle and highlight the key points.

Consider Shared Values and Interests

Action: To bring someone *new* into the life of our organizations, we must first seek out those who we believe share the values and interests that match our mission, or may have tremendous capacity but we aren't sure of their knowledge of our organization, so we can explore if they might be a fit.

Who: Everyone ó leadership, staff, volunteers, board members, faculty. Everyone must be constantly listening and alert as they go about their days for comments or signs of fit with your mission and consider how to best Begin the Conversation.

Goal: If you are passionate about your cause, and I believe, “People like people like themselves,” then the people around you will often share your values and interests. We need to constantly be reminded to listen for these potential connections and then partner with staff to determine the next best step.

Begin the Conversation

Action: This is our first connection and can be a formal visit or an informal conversation that we use, to see if we have enough in common to bring them into the process of Creating a Joyful Giver.

Who: Everyone. Most of the time it makes sense for the person who has identified the connection to begin the conversation. Or, it can be a staff member getting in touch with someone on behalf of a volunteer who would struggle to find the time or would be more comfortable simply making the connection for the staff member.

Goal: To validate that there is a real connection. This is not a “qualifying call.” Rather this is a gentle affirmation that there is enough of a connection to spend more time together.

Creating the Joyful Giver

Action: This is a part of the Cycle that can vary from a few weeks to several years, depending on the prospective giver. Every individual is unique and requires a unique plan to help him understand the impact of your cause and be introduced, over time, to the special work you do, and how individuals can invest in your success in a way that is most meaningful to them.

Research has shown that in general, six to nine meaningful contacts over a period of six months to two years are required to artfully reveal the best fit for the prospective giver at a major gift investment level.

For every time around the Cycle, this phase generally gets shorter as donors deepen their relationship with every investment.

Who: Everyone. While the person charged with leading the development work ó the development officer, the executive director, the volunteer development committee chair ó *leads* the process, it is a place where others can make a major impact in providing the experiences that help the prospective giver connect in the most meaningful way. And, it is wise to have others involved so that the impact of changes in staff and board are softened for major donors.

Goal: The goal is to get the prospective giver engaged and involved in the life of the organization ó the more personal and experiential, the better. As this engagement progresses to explore feelings about the organization's vision and

leadership, giving preferences, project preferences, interaction preferences, and what provides the most joy in giving for the prospective giver, we are prepared to speak an Artful Ask.

Making the Artful Ask

Action: This is generally a visit where the donor knows one or more people are coming to specifically talk about their major gift commitment. From the good work that has been done to Create a Joyful Giver, we know the players who should be involved and have prepared for the meeting.

Who: This depends on what is best when considering this major donor. I advocate that the development professional speak the ask, the board member or key volunteer attend to reassure of the stability of the cause and talk about their own similar level of giving, and leadership attend to detail how the gift will make an impact in his ability to maximize the mission.

Goal: To provide a concrete request to consider a major gift. The expected outcome is either a yes, and we move on to Invoking the Grateful Recipient, or “Maybe,” which takes us back to Creating a Joyful Giver, or “No,” which generally just means “not now,” if we have properly prepared.

Invoking the Grateful Recipient

Action: This is everything that happens *after* the gift or pledge is made. It involves managing the actual gift process — receipt, memorandum of agreement, pledge documentation ó and assuring the donor the gift is properly credited. It also involves the genuine and creative expressions of gratitude so the donor enjoys the act of giving. The time spent in this phase varies. Generally, if done authentically, the donor will provide signals that it is time to return to the Creating a Joyful Giver phase.

Who: Everyone. The person charged with leading the development work will assure that actions are taken; these range from the formal thank you letters, to special events, to random acts of gratitude. It is an excellent place for board members, faculty and all volunteers to play a key and major role.

Goal: Donors have the right to enjoy their giving. This section of the Cycle should be viewed first and foremost as guaranteeing that the donor’s gift is executed according to their wishes, that the appropriate people have been involved in providing updates and progress reports and that contact is regular and consistent. It is also the path to the next journey around the Cycle as conversations turn to the next opportunity for this major donor’s investment.

The Artful Asker Cycle in Action

Let me use an example from my work at the University of Wisconsin

Foundation to illustrate how the Artful Asker Cycle of Successful Relationships works. It's a story that spans more than twenty years, starting with a \$3,000 gift and ending with an endowment valued in excess of \$5 million.

In 1983 I had just started with the University of Wisconsin Foundation. I worked for a program called the Wisconsin Rural Leadership Program that took 30 young rural leaders through a training program in partnership with the Kellogg Foundation. It was my job to raise 30 participants' sponsor gifts of \$3,000 each.

Shared values and beginning the conversation...

I was told to visit "Joe", a potential giver, because his values would align with this program. Joe was the CEO of a major company, and a leader in his rural community.

For Joe, a gift of \$3,000 was a level considered an annual gift. At my first meeting with Joe, I told him about the program and a little bit about myself.

Creating a Joyful Giver and Making an Artful Ask

I asked Joe about his history, and asked him to tell me how he felt about the goals of the program. He was supportive. I then asked him to consider a gift of \$3,000. He said he would consider it and asked me to contact him the next week.

A week later, I called Joe to follow up. He said he had reviewed all of my information, looked at the budget and divided it by the 30 participants, which came out to be \$2,888.21 per participant. That was the gift he was willing to make.

I learned a valuable lesson here: you need to be very clear about your budget, and how the gift you are asking for fits into that number. Had I clarified that we were asking for a gift that was rounded up for the per-participant cost, I know Joe would have been okay with it.

Invoking the Grateful Recipient

After Joe made his \$3,000 gift to the Wisconsin Rural Leadership program, I continued to keep in contact with him. I orchestrated contacts by participants and board members in addition to my own. We took great care to make sure Joe knew how important his investment had been.

In turn, Joe let us know how good he felt about being involved. I touched base with Joe periodically over the years. Somewhere around 1987, Joe was asked by the dean, and agreed to serve on our charter Board of Visitors.

This was a group of key alumni created in partnership between the development office and the dean's office to provide an external perspective and assist with development efforts. It met only twice a year.

Creating a Joyful Giver (Again)

Around this same time, Joe asked, in a board meeting, about undergraduate scholarships in his own department. I put Joe in touch with department leadership and shared the stories of some of our recipients. We began looking at what specific levels of gifts would provide in terms of stipends.

Making an Artful Ask

When I was very clear on what Joe was most interested in, I asked him to consider a \$25,000 gift to support one undergraduate scholarship. He said "Yes" at the call.

Invoking the Grateful Recipient

Again, I had the opportunity to lead a series of experiences that demonstrated the impact of his gift...and also provided nice times on campus. During one of these trips, Joe noticed the long-standing issues with the department building, and this grew into an addition and remodeling campaign.

Creating a Joyful Giver and Making an Artful Ask

I approached Joe, and asked if he would consider serving as co-chair for the building campaign. Because of this role, and the importance of leadership making their own major commitments early on, we discussed various levels of support and I asked Joe to consider three different levels.

He pledged a \$75,000 gift to name one of the rooms in the building and we began a partnership of involving others in the life of the project ó the faculty leadership, volunteers and me.

Invoking the Grateful Recipient/Creating a Joyful Giver/Making an Artful Ask

We completed the drive and celebrated the new building — a great day. We continued to stay connected and a new program was developed where matching gifts were available for graduate student fellowships. We shared it with the board at a meeting and Joe expressed an interest.

In short order, I asked Joe to consider a gift of \$250,000 to endow a fellowship. He agreed. This was in about 2001, I believe.

Invoking the Grateful Recipient

It is just a joy to have an opportunity to recognize and thank, again and again, a donor who becomes such a great partner with you. We had the opportunity to nominate Joe for a couple of awards.

Joe indicated he was planning to retire and sell his business. Leadership wanted me to pursue a gift, but Joe shared he would be in touch with us when the time was right. At this point in a relationship you just say, “Okay,” and leave your dear donor alone.

Sometimes a prospective donor will say that it isn't the right time. We need to respect that. On the other hand, I did keep in touch, in the way friends do. I sent the occasional article of interest or birthday card.

Creating a Joyful Giver/Making an Artful Ask

For Joe, the right time was two years after he sold his business, in about 2003. He called and we discussed how he had been involved in undergraduate support, graduate support, helping with the building, and now it seemed time to recognize the role of the faculty.

I engaged the department in conversations, and after we talked through various options, Joe presented two endowed chairs to the university for \$5 million, twenty years after we first met.

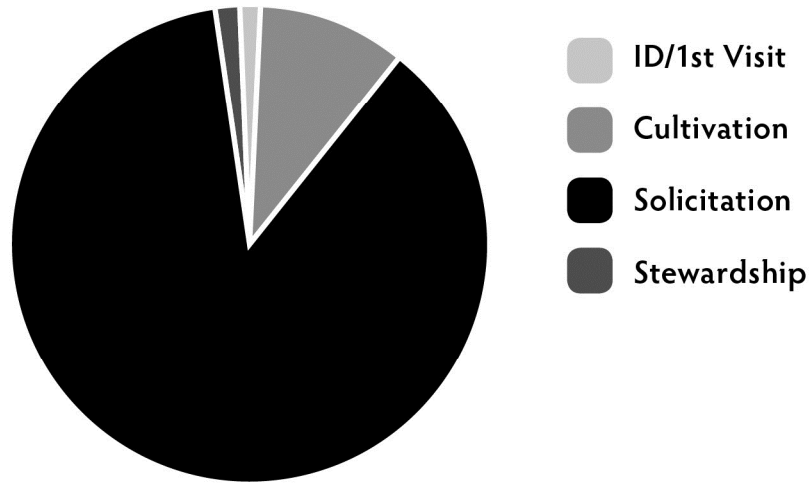
When I left the university there were over forty pages of contacts with Joe that helped guarantee that each and every gift he made would be managed according to his wishes.

For Your Development Toolkit

1. Focus on relationships, not money.
2. Successful major gift programs require a long-term vision with prospective donors along the entire range of giving amounts.
3. Long-term staff and leadership is a positive factor in creating and nurturing long-term major giving. Board (and then as Emeritus board) members are part of this long-term relationship.
4. Major giving happens on the donor's timeline, not yours.
5. There is no substitute for sincere authentic caring and mutual respect.
6. Metrics and records support the relationship process ó they should never be used to make a donor fit our timeline.
7. This one bears repeating... It's not about the money. It's about the relationship.

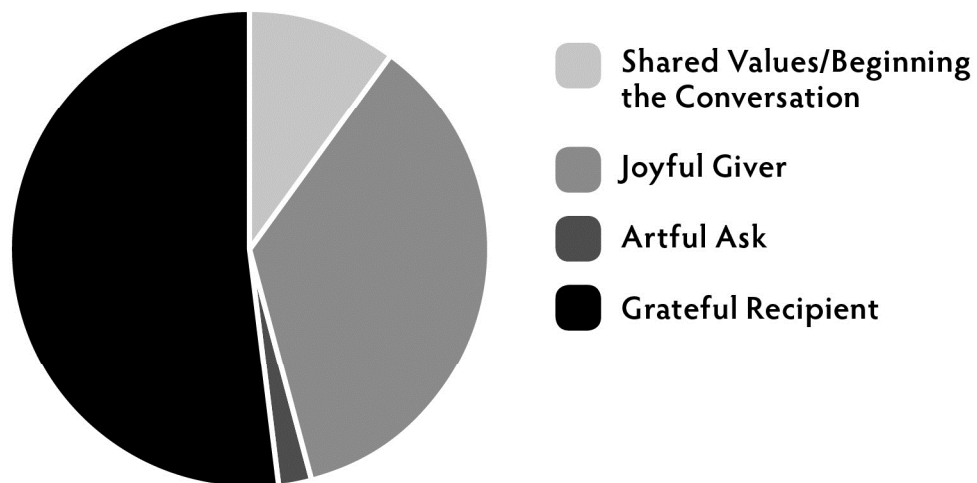
Understanding Cycle Times

Cycle Time[®] Top Down



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Cycle Time[®] With Core Values



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The amount of time you spend at the various stages of a cycle with a potential giver depends on the unique situation of each donor. The *proportions* of your time spent overall in each area, however, should remain about the same.

Using the Cycle correctly changes the emphasis from a “Numbers Focus” (top chart, previous page) to the artful “Donor Focus” (bottom chart, previous page).

When organizations focus on asking, long-term success cannot be sustained. When their staff, board, and volunteers feel empowered to focus a larger proportion of time on Creating a Joyful Giver and Invoking the Grateful Recipient, both donor-focused, (bottom chart) they will experience significant and lasting increases in major giving.

While the development professional is responsible for assuring that the next steps in creating a relationship with a prospective giver are happening, the connections can and should involve the board, those impacted with giving, and others who can create the best experience for the donor.

For an organization to increase the number of relationships it sustains, it is imperative for the board to be involved ó to partner with the development officer on the interactions needed.

This is why active participation from your board members is so important. They can support the development staff by making sure that people see the positive effects of their gifts, that their money has been used in the way they directed, and that your organization is truly grateful for their support. So even if they are not comfortable making the ask, they are still a large and important part of the development process.

Annual Fund and Major Gifts

The annual fund supports major gift work and is vital to the success of a major gifts program. The annual fund development professional goes through the same steps, but more quickly, perhaps on one call, because the donor can make a decision at this level quickly.

These annual gifts, and the way they are managed, play a key role in the success of the major gift process. Generally a major gift is a commitment of 10 to 20 times the person’s annual gift level and a result of a longer trip around the Cycle.

The Artful Asker Cycle of Successful Relationships©

