

# Compelling Conversations *for* Fundraisers

Talk Your Way to  
Success with Donors  
and Funders



**Janet Levine and Laurie A. Selik**

## Praise for *Compelling Conversations for Fundraisers*

**“To make the ask, you need this book, whether you’re a new fundraiser or an old hand. *Compelling Conversations for Fundraisers* provided me, a development professional with 20+ years experience, many fresh ways to approach donors and effectively make the ask.”**

*Liz Leshin, Director of Development*  
LOS ANGELES CONSERVANCY

**“*Compelling Conversations for Fundraisers* reminds us that **human interests drive philanthropy** and encourages fundraisers to weave authenticity through their conversations.”**

*Natalie Rodriguez Jansorn, Director, College Excellence Program*  
THE ASPEN INSTITUTE

**“Janet and Laurie **take the mystery out of asking for money** by breaking conversations down to a very easy-to-understand and applicable level.”**

*Gregory Bradbard, President & CEO*  
INLAND EMPIRE UNITED WAY

**“*Compelling Conversations for Fundraisers* **helps us to bring donors and prospects closer to our organization** and to their own philanthropic dreams.”**

*Lisa Van Ingen Pope, Senior VP of Branch Financial Development*  
YMCA OF METROPOLITAN LOS ANGELES

**“*Compelling Conversations for Fundraisers* brings keen focus, and **helps take the ‘rush’ out of preparing for key pitch meetings** so I’m able to go in grounded, confident, and ready to listen.”**

*Sue Schardt, Executive Director*  
AIRMEDIA.ORG

**“A **refreshing and a profound tool** that reminds us skills such as listening, being direct and simply having a conversation about our shared passions touches our basic need to be heard and make the connection with other like-minded people.”**

Debbie A. Cannon  
ACADEMY FOR GRASSROOTS ORGANIZATIONS



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Janet Levine  
Laurie A. Selik



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## CHAPTER 1 VALUES AND THE CASE STATEMENT

*Who are you?*

That's not just a rhetorical question. Before you can have compelling conversations with your donors, it's important that you have clarity about and understanding of your organization. You need to know not just what your mission is, or what programs you have, but also what you accomplish—why your organization makes a difference. In this chapter we introduce how you can use values to have deeper conversations with your donors.

If your organization writes grants or has recently led a specific fundraising campaign, you probably have some sort of case statement. While a case statement often ends up as a case for giving—(usually) a glossy sales brochure—we are focusing on your internal case statement: the document from which you build all your fundraising materials.

Above all, the case statement answers our very first question: *Who are you?*

Nonprofits are mission driven organizations, so your case starts, appropriately enough, with your mission. Notice that we did not say “mission statement,” though if your mission statement clarifies why your organization exists, use it. If it does not, or does so imperfectly, craft a few sentences that explain the purpose of your organization.

➔ What is your mission? .....  
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Your leadership’s vision for what lies ahead is also important. If your organization has a current strategic plan, you may have worked on vision statements. However, not all organizations actually have a vision. Janet worked at a community college where the president railed at the idea of vision. “Vision,” he would steam, “we have no vision. We’re a community college.”

While that was disheartening, his perspective also brought to the forefront an important issue for the institution. As the immortal Yogi Berra is credited with saying, “If you don’t know where you are going, you might wind up someplace else.”

“Someplace else” is probably not where you want your organization to go. But where do you want to go? That is the question your vision answers.

If your leadership has created a vision for your organization, write it down in the space below. If there isn’t a current vision, consider what you think the direction of your organization ought to be. Then write your vision of what your organization aims to be or do in the future, not just your purpose today.

➔ What is your vision? Where is your organization headed? (Think big and be specific).....  
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Standard case statements go from mission and vision to answering a series of specific questions that discuss your organization’s history, challenges faced, and solutions to those challenges—including financial solutions. We provide a complete description on what a compelling case statement covers in the Resources section.

### WHY VALUES MATTER

For our purposes, developing the case for having compelling fundraising conversations shines a spotlight on one critical area: values. Our favorite definition of values is “the importance, worth, or usefulness of something.”

Values are the things that have meaning to your donors. They are the reasons they are motivated to support your organization. They range from Accomplishment to Zeal and tons of values in-between.

One of the trainings we do is called “Values Based Fundraising.” We use the “Motivational Values” cards from a non-profit consulting practice called 21/64 (2164.net).

21/64 created the cards to help the next generation of donors consider how each of the 25 values described in the deck influences personal and/or philanthropic decisions. We use the cards to help those responsible for

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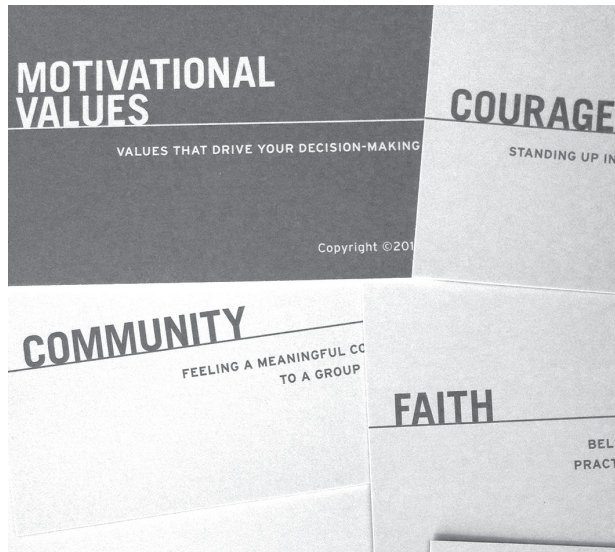
**VALUES LIST**

- Achievement
- Balance
- Community
- Creativity
- Democratic
- Diversity
- Excellence
- Family-oriented
- Growth
- Joy
- Positivity
- Rigor
- Service
- Teamwork

See the Resources section for more.

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fundraising (staff and volunteers) have meaningful conversations about giving. We believe, along with 21/64, that the more your decisions are aligned with your values, the more fulfilling and strategic they will be.



**Motivational Values cards from 21/64.net.**

➔ What values speak to you? Undoubtedly there are many. Among our top 10 are community, freedom, and opportunity. What are your top three values?

1. ....
2. ....
3. ....

In our trainings, we ask people to first chose a value card that calls to them today and then pair off into groups of two. The first part of the exercise is to simply tell the other person about the value chosen and why it matters to them. People tell us that these conversations are among the best they have ever had. They learn things about others they never would have uncovered. More importantly, they learn a lot about themselves.

The next exercise is to stay with your chosen partner and talk about your nonprofit based on the other person’s value.

In real life, however, you don’t have value cards that jump-start a conversation, and you may not know what the other person’s values are. But if you approach a conversation about your organization from a values standpoint, you will soon find out.

Laurie, for example, works at a school that has a program providing underserved students a top notch performing arts education at no cost. She talks to her prospects and donors about the many programs her organization offers—how many classes, the teaching techniques, profiles of the students, accomplishments of the faculty. But to get someone’s initial interest, she knows that most people don’t care about how you go about what you do—they only care about what it means and how it changes lives. So Laurie approaches her prospects from a values point of view: for example, opportunity, education, excellence.

*What I love most about the Colburn School is how we provide our students with opportunities they may not otherwise have to study music with world-class teachers. I’d love to have you visit us. It’s so amazing to listen to our students as their teachers guide them to reach deep within themselves to play better than they did the day before. I see how students grow along with their commitment to music. And I have to tell you, it is magic. Do you think you have time for a tour sometime in the next two weeks?*

By talking with her prospects and donors from a values standpoint, she avoids a common pitfall of losing her prospect before they get started because the first program she describes may not be one that has meaning to that prospect. With a values perspective, however, we are talking about something larger than seven-year-olds learning how to play violin.

When Janet does public trainings, she often asks people to introduce themselves, telling the rest of the group what their organization does. Inevitably, people talk about the programs the organizations offer, how old it is, its locations, the people it serves (usually “underserved populations”) and afterward the group hasn’t learned anything compelling about the organization.

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“Here are the values that I stand for: honesty, equality, kindness, compassion, treating people the way you want to be treated and helping those in need. To me, those are traditional values.”  
—Ellen DeGeneres

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Values are not history or activities. They represent the difference that your organization makes. Instead of saying, “We are a food bank that picks up food from local food stores and restaurants and has pantries in eight locations around our city. Our volunteer drivers pick up and deliver the food on a same-day basis, ensuring our clients get fresh food,” consider what all this activity means.

We could use the value of compassion to talk about this organization, or one we mentioned above, community. We might talk about the fact that one in five children in the United States goes hungry every day. For example: “We work as a community of volunteers, food stores, restaurants, to ensure that those children get fresh food and can enjoy a hunger-free life.”

➔ How might you tell a new acquaintance (or an old friend!) about your organization? Note that by using values, you are making these conversations personal. ....  
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So how does Laurie make her conversation about her organization—using one of the values we mentioned—opportunity—her own?

Laurie: *I was really lucky when I was growing up. My parents exposed me to so many cultural things—we read, listened to music, went to the theater. I really loved to tap dance and took lessons for years. It really opened the*

*world up to me, and showed me so many possibilities. What I love about my organization is that, beyond music, it teaches kids who wouldn't otherwise have the opportunity the joy of learning.*

At this point, she stays quiet, and waits for the other person to respond. While she could also end that statement with a question, she would want to ensure that it is open-ended and not one that requires a simple yes or no.

How might you use a value to begin a conversation about the following types of organizations?

➔ Social services for developmentally disabled children: .....

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➔ School (either K-12 or post-secondary): .....

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➔ An environmental organization: .....

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➔ Your organization: .....

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You'll find that learning your donors' values through conversations will help you to make the all-important connection for them to your organization. They may know why they show up for performances or volunteer to deliver meals, but it's up to you to remind them of how your organization is delivering on their deeply held values and beliefs. If you can do that, you are likely to have a loyal donor.

### A VALUES-BASED COMPELLING CONVERSATION

Bethany is the director of development of an organization that mentors low-income girls through writing. Amy, a board member, has invited her friend Kathie, a writer, to lunch. Long term, Amy and Bethany hope that Kathie will become a significant donor. Short term goal, however, is to get Kathie interested and willing to come and share her experiences as a young writer (decades ago!) with some of the girls. Now, the three women are seated at a table in Amy's favorite restaurant.

*Kathie: You've told me so much about this place, Amy—I'm so excited to finally get to eat here!*

*Amy: And I'm so excited to be able to get you together with Bethany and, I hope, our fabulous organization.*

Kathie smiles, but doesn't say anything. After a short silence, Bethany jumps in.

Bethany: *Kathie, what—if anything—do you know about our organization?*

Kathie: *Well, Amy keeps trying to get me to do either a panel or teach a workshop, so I know that. And I know that this is for young girls. But, really, that's all I know.*

Bethany: *That's a good start. And yes, we do produce panel discussions and workshops, but mainly we help girls have a voice.*

Kathie nods, but remains silent.

Bethany: *Most of our girls come from very low-income families. And, unfortunately, that usually means parents—or mainly parent, singular—have little education. These kids are smart, Kathie, but they don't know how to communicate, to articulate what they want, hope for, dream about. And that's what we offer.*

Kathie: *The girls are how old?*

Amy: *12 to 18. We work with the middle and high schools in our community to identify the best candidates.*

Kathie: *And what makes a girl a good candidate? Good behavior? Grades?*

Bethany shakes her head.

Bethany: *Not completely. We do get the good students but we also get the ones who are acting out and seem headed for trouble.*

Kathie: *That would have been me.*

She lowers her head and a small smile plays around her mouth.

Kathie: *I wanted so much when I was a kid—but I couldn't see how to get what I wanted.*

Amy: *That's why our organization is so important! We help these girls see a path and be able to talk about what they want. It makes them feel...*

Kathie: *Worthwhile?*

Amy: *Yes! And we have incredible results.*

They talk for awhile, telling Kathie about how the program keeps girls in schools and out of gangs. How many of their girls go on to college. Bethany pulls a book out of her briefcase.

Bethany: *And this is the book that we published last year. It's full of stories and poems by our girls. Another anthology will be coming out in another year. And now, one of our mentors is a playwright, and she is working with a group of girls to turn this story—she opens the book and points to a story—into a one act play. The girls hope to perform it at the Fringe Festival in Scotland next year.*

Kathie: *Wow! That's impressive. But honestly—are any of the difficult girls involved or is it all of the good students?*

Bethany: *We don't differentiate our girls by behavior or grades. We expect all to participate. That's the point. By finding their voices they all—every single one of them—realize what winners they are. That makes all of us stronger. So what do you say, Kathie—are you on board? Will you come and talk with our girls about how you broke into professional writing?*

Kathie: *Sign me up!*

## THE PIVOT

One of the hardest parts of fundraising is moving your conversation to the topic of making a gift. Even if you are engaged in a conversation about values—and how your involvement with your organization helps you to live your values—it can feel daunting to lead the conversation to something a bit more specific. Turning the conversation from just social to having a compelling conversation about support for the organization takes finesse and practice.

We call this “the pivot” and you use it when you want to move the conversation to your purpose: whether learning your donors values or, when ready, to ask for a gift for your organization. The good news is that, handled correctly, it is no big deal. The secret is that you always remain clear about your intentions for the conversation or meeting.

For example, you met Susie at a chamber event. When you mentioned your organization, she told you that she was really interested in your cause. Naturally, you thought, “What a great prospect!”

So you decide to follow up. When you contact Susie to set up a time for the two of you to get together, the conversation (and note, this conversation can be on the phone, via email or even text) should *not* be:

*Hi Susie, I so enjoyed meeting you and would love for us to get to know each other better. Can you do lunch on Thursday?*

That may get you a lunch date, but Susie will undoubtedly be thinking the conversation will be mostly social. Instead, be very clear:

*Hi Susie, I so enjoyed meeting you at the chamber mixer and hearing about your interest in (your cause/constituency/organization). I would love for us to get together so I could tell you more and learn how you might become involved with us.*

She may very well say “No thanks. I was just blowing smoke and honestly, could care less about developmentally disabled dogs,” but then you won’t be wasting time with someone who we call affectionately a “China Egg” (i.e. will never hatch).

Pivoting, of course, is not only necessary when you make the appointment. It is a critical step when you are in the meeting. When Janet first started her fundraising career, she was Director of Corporate Relations at the University of Southern California’s Viterbi School of Engineering. Much of her work was with senior corporate executives who partnered with her to get seriously large gifts for the school from their companies. At

some point, Janet had a brainstorm: These are all high level, well paid guys (and back in the 1980's, they were all guys). I should talk to them about their personal gifts to the School.

Early in this process, one of her corporate contacts died. At the funeral, the gentleman's wife asked Janet to "give me a few months, then let's get together." Clearly her interest was in doing something in honor of her late husband.

A few months later, Janet called the wife and they arranged to have lunch. As they sat down, Janet asked how the wife was doing and was told that she was remodeling the house. They talked about that remodel until lunch was almost done and they were having coffee. Finally, the wife put her cup down and, looking straight at Janet, said, "You don't do this a lot do you?"

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## ALL EARS

*Listen.*

Let's face it, the most compelling conversations are the ones where you are at the center. But if you want to cultivate and ultimately solicit a prospect, your job is to let them shine.

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She then went on to explain that she had lots of friends to talk with about her remodel. Lovely as Janet was, she wasn't this woman's friend. This lunch was to be about a gift in honor of the husband, and Janet's job was to turn—pivot—the conversation quickly to that point.

Humbling as it was, it was lesson that Janet never forgot.

## FOCUSING ON YOUR GOAL

When your intention is to talk about a gift for your organization—whether it is a first or a fifty-first conversation—it is your job to keep focused on your goal and to watch the clock to be sure you save time to ask.

"Hi, Susie. Thanks so much for meeting with me. How is everything?" is a fine start. But let it be the start and once she says "everything is good,"

move right into your purpose for getting together.

Because this is a book about conversations, we want to be clear that at this point you do not launch into a monologue about the organization or the specific project for which you are raising funds. Rather, use this time to learn as much about your prospect and her potential interest as she will learn about you and/or the project.

How do you do that? By framing as much as you can as open-ended questions.

*As I mentioned on the phone (in my email/text), I was really excited about your interest in the work that we do. How did you first get interested in...?*

Then *listen* to what Susie says.

## A SHORT BUT COMPELLING CONVERSATION—WITH A PIVOT

Richard is a top prospect at your organization. Charlene, the development director has tried—and failed—to get an appointment to move Richard from prospect to donor. She knows that her board member Joan and Joan’s husband are friends of Richard so she is meeting with Joan to ask for her help in moving Richard.

Charlene: *Thanks for meeting with me, Joan. I know how busy you are.*

Joan: *It’s just been crazy. You know our granddaughter is turning 16—and omigod, the preparations for her sweet sixteen. You’d think it was a wedding. I have spent I don’t know how many hours helping my daughter decide on the place...*

Joan is off, talking-talking-talking and avoiding the topic at hand. Charlene must turn the conversation around. Finally, Joan takes a breath.

Charlene: *That sounds pretty intense. Your daughter is lucky that you are so willing to help—and I’m hoping that our organization will also be able to*

*benefit from your assistance.*

Though she really doesn't want to give Joan a chance to change the subject back to her granddaughter's party, she knows she must be silent and let Joan respond. Which she does.

*Joan: Of course. I love this organization. That's why I serve on the board and have been so involved for so many years*

*Charlene: And we do appreciate your many contributions. Today I wanted to talk very specifically about Richard Taunton.*

Joan nods and says that he is an old friend.

*Charlene: That's why I am asking for your help. I've been trying to get a meeting with him for months, but I can't even get him on the phone. Can you help brainstorm some ideas? And to be honest, I'm hoping that you will join us in a meeting with me and Richard.*

## GETTING A FIRST APPOINTMENT

Joe and Shirley have been on your radar for a while. They are known to be philanthropic, but you've been unable to find anyone within your organization who knows them, and you really have no reason to think they have a particular interest in your organization.

However, they came to your gala this year because they are the friend of a friend of the honoree. You meet them at the event and Joe gave you his business card. How might you first approach Joe? Remember to be clear about your purpose—not just to have a meeting but what the meeting will be about?

- ➔ Opening statement connecting Joe to your organization: .....
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What will you say if Joe demurs? For example, you call Joe and after reminding him who you are you say, “I would really like to get together with you (and Shirley, if you think that best), and give you more information about our organization. Could we meet for coffee/lunch/whatever *or* could I come to your office/house either Wednesday in the morning or Friday later in the afternoon?

In an ideal world, of course, Joe would say great. But in real life, Joe very well may say:

- 1. *No thanks. I'm just not interested.*
- 2. *I'm really busy now. It wouldn't be a good time.*
- 3. *If you are going to ask for a gift, I'm going to have to disappoint you.*

➡ What would your response be to each of those scenarios?

- 1. ....
- 2. ....
- 3. ....

Our recommendation, regardless of which excuse Joe gives you, is to first give it that old college try:

- *I understand. Is there an organization you are involved with currently? (You might as well get information that you might be able to use if not now, then at a later date.)*

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## PIVOT TIPS

Your pivot is a bridge from the current topic to the focused topic you want to discuss. Listen for natural pauses in the conversation and, with care, pivot to the point of your meeting. Your shift in the conversation may be indirect, as long as you know where you want to lead your donor.

Sample Pivot Phrases:

...I'm glad you brought that up, because [our organization] also...

...I'm hearing that you are concerned about what you will leave for your grandchildren. Did you know there are tax benefits for them with some planned gift products?

...Before it's time to go, I would like to share with you/ask you...

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- *I understand. When would be a good time for me to reach out to you again?* (Building relationships takes time; just make sure that if he says, “after Christmas” you note it in your calendar and if he says, “After the big board meeting,” you find out when that meeting is, and actually reach out to him again.)
- *To be honest, Joe, at some point I hope you will make a gift to organization. But we are a long way away from that point. As I said, I really would like to share with you the amazing work we do. Would you be able to meet for coffee next Wednesday at, say 9:30?* (Offering Joe a specific time focuses his response on when rather than whether.)

## MEET, GREET...PIVOT!

Let's assume that Joe does, eventually, agree to meet. Plan how you will pivot the conversation after you've greeted Joe (and, perhaps, Shirley). Pretend you are a screenwriter and continue the script we've begun:

*You: Thank you so much for meeting with me. It's been awhile since we saw each other at the gala. How is everything?*

*Joe: As I mentioned on the phone, it's been a busy time. I had a big board meeting to prepare for.*

*Shirley: And just before then, our daughter Katie got engaged.*

*You: Congratulations! When is the wedding?*

Shirley tells you in six months, and proceeds to talk and talk about her daughter, her soon to be son-in-law, the wedding. It's important information you are gleaning, but at some point, you need to pivot.

➔ You + the pivot: .....  
.....  
.....  
.....

Yes! You must get the conversation back on track. Affirming their exciting news is a good way to move back to the point at hand, for example:

*Things at our organization are also at a pretty exciting point—and that is why I wanted to get together with the both of you. I want to make sure you know the direction we are heading in, how your past support has already made a difference, and talk more in depth about your future involvement with us.*

With all that is going on in Joe and Shirley's life, you might feel a little hesitant to talk about renewing and/or increasing support for your organization. It may seem that they are overwhelmed as it is and anything else will be too much. Yet, the fact that they agreed to the meeting tells you that want to be involved—and now is the time to start that process.

The fundraising process is often shown as a circle, or an infinity sign. That's because, while there are specific steps—Prospecting, Cultivation, Solicitation and Stewardship—the process isn't always linear and it is never-ending.

## DONOR CULTIVATION CYCLE

As you know and we'll examine in later chapters, your best prospects are often your existing donors. So what looks on the cycle as stewardship may actually be cultivation for that next gift. And, throughout the process you should also solicit your prospects for numerous things such as names

of other potential donors, introductions to prospects they know, information about people or organization.

At all points, your job as the fundraiser extraordinaire is to be moving your prospects and donors through the cycle, ensuing they don't fall off. The best way to do this, of course, is to get to know as much as you can about your prospects and donors.



Successful fundraising has been described as “The right person asking the right prospect for the right gift for the right project for the right amount at the right time in the right way.” Finding out about all those “rights” is why we need to have compelling conversations with our prospects and donors.

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## WRAP UP

We've covered a lot of ground in this chapter—from mission to message, all tied together with values. Never again (we hope!) will you introduce your organization by reciting facts. Rather, you will talk about what your organization accomplishes and why that matters. Instead of learning an elevator pitch, you'll hone your skills in creating conversations—ones that invite the listener to participate with the goal of developing partnerships that will benefit your organization and the prospect.

Doing that means mastering the art of the pivot: Moving the conversation from the social to the specific and creating a space where you are learning about your prospective donor. It can also mean pivoting from what sounds like a rejection into a (compelling!) conversation that moves your prospect one step closer to becoming (again, perhaps) a joyful donor.