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## Leading the Donor Dance | Choreography that Translates into Deeper Relationships & Increased Funding

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Recognizing that less-resourced NGOs can't afford to engage our fundraising services, one of the ways Black Fox Philanthropy serves the social sector is to be open-source on much of the content we've developed. We regularly release this content via our blog, and today is one of those days!

To preface the blog, I want to share that a great deal of the underpinning of this approach to engaging funders was borne out of my time engaged with the [Sandler Sales Institute](#), a national sales academy. In my early twenties, I made the sizable investment of \$3,000 - a whopping amount in the late-eighties for someone new in their career - to join Sandler's President's Club. I was fortunate to have their leading trainer, [Guru Ganesh Khalsa](#) as my mentor, who embraced integrity-based sales with a focus upon win-win outcomes. Twenty-five years later, when starting Black Fox Philanthropy, I re-engaged Ganesh to help adapt proven corporate sales approaches to the social sector. He did so as a pro bono investment in the sector, as he was mission-aligned with our work on behalf of organizations around the world. The trainings I've done across the globe continue to evolve to adapt to the social sector, and have culminated in this document entitled "Leading the Donor Dance."

**Designed for high net worth individuals & family foundations; However, process fits well with all funders if customized**

This process increases the odds of great outcomes through a system that connects you deeply to current and future funders. This choreography will reveal your funder's emotional link to your mission, build your and your organization's credibility, and develop lasting relationships that make the necessary work of fundraising more fulfilling. Note this level of document is intended as a "cut & paste" and "plug and play" approach for the novice to the more experienced fundraiser, including board members. Add more questions based upon field experience as a fundraiser — your hands-on experience with your funders should inform and enrich this living document.

**Rule #1:** Seek First to Understand, Then to Be Understood (Covey). Be genuinely curious about the funder's story, and appreciate their philanthropic journey to date. When you ask your questions, deeply listen to their responses. **Worth repeating: Deeply listen to their responses!** Listening, not pitching, is the pathway to deeper engagement for both sides, resulting in greater emotional investment in you and your organization that translates into greater financial investment and advocacy for your organization.

**Rule #2:** Know Your Funder. Foundation giving priorities are easily uncovered via the internet; however, obtaining a giving profile on individuals is harder to come by unless you or your "connector" has insights. Go in with at least two nuggets of information to show your donor that you are focused upon them and that you are genuinely exploring if they are a fit.



**Rule #3:** Lead the Donor Dance with Questions. The donor should be doing the majority of the talking, but it is up to you to lead the dance in a way that helps them arrive at the outcome that is for the highest good of all. The suggested questions in this document can be omitted or altered, mixed and matched, to reflect the personality of the development person and the donor. Tailored questions should not exceed one page, and many will be abandoned based upon conversation flow.

Note: The spirit of this document is to help reveal the funder's heart, and share your own heart/your "why" in this journey you will embark upon together. While one-off gifts are fine, the ultimate goal is to develop deep and sustainable alliances that are based on a shared vision.

**Rule #4:** Don't respond to answers immediately. Take Notes. The answers they provide are specifically telling you how to enroll them as your funding partner but do so elegantly and in its right time. It may be in the initial meeting; it may be a much larger ask that requires additional meetings, a formal written request and/or presentation, and other decision-makers.

**Rule #5:** Reflect back their vision and tie their vision into your Case for Support.

Reflect back what the funder has said are the key reasons for giving ("Let me see if I've got this right..." "Did I miss anything?"). Then share how your organization matches their giving profile. Don't add on what is not necessary; just because you think it's a great feature of your work doesn't mean the funder cares. In fact, it could pull attention away from what the funder most wants to focus upon in your work.

## A. Bonding/Rapport

Build trust through shared experiences and shared vision around advancing your mission. Always share why is this yours to do. Trust is something that is partly earned because they see your passion and your commitment to the cause. Sharing the "why" behind your work, the cause, belief or purpose immediately connects to the limbic part of our brains that builds trust and loyalty. Refer to the "Crafting Your Why" worksheet to uncover key messages that make you come alive.

In short, to be truly effective, you need to care deeply about the cause you are representing so that you can connect to the funder in a heart-centered way. From that space, you build your relationship with the idea of linked arms, vs. hand out. You are in it together - as equals but coming from different forms of contribution - to solve for the issues you all care about.

## B. Up Front Contract

Loosely translated, let's show an appreciation for one another's time, **and set the tone as equals exploring joining together to solve an issue**. Set expectations.

1. What most inspired you to invite me in to talk with you about solving (issue area you are working on)?



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2. We've set aside an hour; what do you need to experience or know to feel confident this was a great use of our time together?"
3. I take a deep dive with our potential partners to understand their journey and their vision for a better world. Are you comfortable with me asking a number of questions to get clear on what your vision is?
4. After we've invested this time, we can decide together if this work is ours to do as partners/kindreds on the journey. If we do decide to join together, we can discuss the next steps at the end of our meeting. Does that sound like a good plan?



### C. Discovery Step (Seek to Understand) - Sample Questions

Before presenting your organization, uncover the funders' giving priorities and the "why" behind them. As they share insights don't jump in with "we do that" - Instead, wait. You're gathering information now that will inform your presentation/case for support.

For each question, if you feel there is more to uncover that is important then you can explore it further with "Tell me more..."

1. You have a rich philanthropic journey; tell me about your gift to XX - what is it about the organization that inspired your engagement?
2. You've also been incredibly generous with XX organization. What is that inspires that level of investment?
3. The more I learn about you and your giving, I'm struck by the level of intention involved. What do you typically look for in an NGO/nonprofit in order to feel comfortable making a sizable investment?
4. What do you expect of the organizations your support (and/or serve)?
5. Based upon my understanding of your priorities, it appears that (insert your issue area) is core to your giving - Is that accurate? If yes, "Tell me more.... and/or How did you arrive at this strategy?" Or If no, "What is at the heart of your giving?" "What inspired that approach?"
6. What is your greatest funding amount given to other organizations in our issue area of \_\_\_\_\_, and what are they doing that inspires that level of investment?
7. What does a typical financial gift look like when you engage with a new organization? What would inspire you to make a stretch gift?
8. Under what circumstances do you sunset funding an organization?

Other: Bring in additional questions that tie in your organization's strengths with the funder's priorities. For example, was gender equality important, peacebuilding, economic prosperity/poverty alleviation? Examples include:

9. To what extent is peacebuilding/economic prosperity/food security/clean water/sanitation an aspect of your giving strategy?
10. In light of the political landscape, peacebuilding has gained important momentum in the social sector - is this something you've considered in your giving?
11. In light of Sustainable Development Goal (SDG) 5, Gender Equality, being core to achieving all 17 of the SDGs, to what extent is gender equality/access to education a part of your giving priorities?
12. Is there anything I may have missed?

### D. Vision

People initially engage - for the most part - based upon emotion, which is why identifying vision and/or pain points is so important in the courtship stage. Without identifying and addressing the emotional link to your mission, the likelihood of a gift dramatically decreases. Help the donor realize the gap between where they are and where they want to be through probing questions:



1. What is your ultimate vision for (the issue area you both seek to solve)?
2. What frustrations have you encountered in realizing that dream?
3. What has been your greatest success story thus far in realizing that dream?
4. What ultimate impact do you see yourself having in that realizing that vision?
5. What's at stake if the vision is not realized?

## F. Decision Step

Qualify or Disqualify the Funder. Does funder make decisions on their own? Do they get help from an associate or spouse? Do they think things over or can a decision be made now? The goal is to uncover the following:

- Who is involved in the decision? Who makes the final decision?  
What is the decision-making process?
- What is the timeline?
- What will they base the decision upon (a lot of this content should have been uncovered in the Discovery phase)?

Sample Questions:

1. How do you typically arrive at a decision about what organizations to support? Do you get input from your spouse/family? Any help from others? (Note: When husbands and wives give together, the checks are typically larger.)
2. If I were to ask you today to make the transformational gift of \$XX, what would you need to know to say yes?
3. We are launching a project in the community of X in February that focuses upon X. We'd love to partner with you on this; what do you need to know by December to work with us as a partner on this project?

## G. The Funder-Centered Case for Support

Tie in things they've shared, demonstrating you heard them and are tuned in to what is important to them in their giving.

Use visuals! 65% of the population consists of visual learners. "Do you mind if I show, not tell?" Have a slide show with your live narrative (auditory learners), highlighting how their vision ties into your work. You can also use a video. In both cases, talk about the people in the slides/video. Tell behind-the-scenes **stories** of the people you are serving so the listener can connect with the human element beyond the visuals while anchoring in your mission through storytelling.

Note: Many funders respond well to deadlines. It focuses on their passion and why you are doing what you are doing. Example: Now that the program has been a proven success since 2007, the vision is \_\_\_\_\_ by 2022, a 3-year plan that needs a financial anchor now, someone like you who also cares deeply about (issue area). You could go farther with: "I thought of you specifically because of your deep commitment to \_\_\_\_\_, and \_\_\_\_\_."



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Paint a picture of how their specific gift will make a difference. The arc of that narrative should include:

\* We Share in the Pain of How Things Are. We share your vision of \_\_\_\_\_  
(example: lifting millions out of poverty in East Africa).

\* This is How the Communities We Serve Used to Be ((Stories/Emotional Texture of individuals who represent a larger population are most powerful, giving your audience someone to connect to and root for.)

\* Because of Supporters Like You, This is How They Look Today. (Stories/Emotional Texture of individuals who represent a larger population are most powerful)

\* With Your Help, We Can Have XX Impact Within One Year (Urgent, Tangible)/3 years.

## H. The Ask

Quite simply: “We want to join together in our shared vision of \_\_\_\_\_. Will you join us on this journey?” Make a specific dollar-amount ask based upon all you’ve uncovered. OR if you are not confident in a specific amount based upon how the conversation has unfolded, an alternative is:

“You’ve shared your heart and vision beautifully, and it’s clear that solving this (issue area) is something you care deeply about. I would love invite you to join us, but I’m not sure where to go next in terms of making a financial ask. Based upon all we’ve discussed, where do you see yourself?”

Another Way:

It’s clear based upon our conversation that realizing our shared vision of \_\_\_\_\_ is profoundly important to you. Under what circumstances would you:

- a. Make an unrestricted gift of \$XX
- b. Make a 3-year pledge of \$XX
- c. Leverage a challenge grant of \$XX
- d. Other: Host a gathering, Jeffersonian Dinner
- e. Other: Join our Board
- f. Other: ?

What they share in their answers are the specific ways in which to engage them. The next steps would be fulfilling what they need to engage (as long as it fits within your mission, of course).

If the funder cycle is longer and involves a proposal or grant submission:

Send an immediate handwritten note with an article of interest or some nugget, something that came up from your conversation that is not about your organization.



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Send a formal follow-up email after the meeting to recap your understanding of the Funder's giving priorities. Advise them that this will be the framework for a formal proposal. Then ask "Have I missed anything?" Note: Written proposal/grant submission should be based primarily upon these funder priorities.

Regardless of if a person commits at that time, ask: What other potential supporters do you feel should know about our work? Who else cares as deeply as you do about \_\_\_\_\_?

Would you be open to making an introduction?

NOTE: Customize, add and delete questions based upon the funder and the circumstances.

## J. Declined Funding Response

If the answer is No, get clear on why you were invited to meet/submit a proposal, why the declined funding, and what opportunities may still exist in the future. You can share that you are always seeking to improve to would like to gain more clarity via a 20-minute conversation, preferably a video call. Sample questions:

1. What was the original inspiration behind inviting us to submit a proposal?
2. What was the most compelling aspect of the submission?
3. What aspects of our organization set us apart in a positive way from other organizations you've funded?
4. What areas do you feel could be improved upon?
5. What do you feel is the weakest link in the submission?
6. What would have made that weak link stronger?
7. What could I have done differently in our conversation to have arrived at a yes?
8. On a scale from 1 - 10, where did we land in terms of being a fit with \_\_\_\_\_ Foundation?
9. What would have made it a 10?
10. What is your greatest funding amount given to other organizations in our issue area of \_\_\_\_\_, and what are they doing that inspires that level of investment?
11. We are always seeking to improve. What are the core reasons you're not willing to invest in us at this time? If we are able to address these things can we continue the conversation at a later date?
12. Who else in your funding network who cares about \_\_\_\_\_ do you feel should know about our work? Would you be open to making an introduction?

*Close with gratitude and a handwritten note within 24 hours.*