



A New Approach to Fundraising

By Ken Ramsay

Table of Contents

<u>Foreword</u>	
<u>Section One - Theory and Research</u>	
<u>Chapter One</u>	
<u>Why We Fundraise</u>	
<u>Chapter Two</u>	
<u>Today's Emerging Donor and the Nature of Dialogue</u>	
<u>Section Two - Tools of Empowerment Dialogue</u>	
<u>Chapter Three</u>	
<u>The Cycle of Philanthropy</u>	
<u>Chapter Four</u>	
<u>Ten Principles of Empowerment Dialogue</u>	
<u>Chapter Five</u>	
<u>The Practical Application of the Empowerment Dialogue Approach</u>	
<u>Section Three – The Practice</u>	
<u>Chapter Six</u>	
<u>Basic Empowerment Dialogues</u>	
<u>Chapter Seven</u>	
<u>The Mission Dialogue</u>	
<u>Dialogue Questions</u>	
<u>Dialogue Deepening Questions</u>	
<u>Chapter Eight</u>	
<u>The Case for Support Dialogue</u>	
<u>Dialogue Questions</u>	
<u>Dialogue Deepening Questions</u>	
<u>Chapter Nine</u>	
<u>Gift Type Dialogue</u>	
<u>Chapter Ten</u>	

Gift Capacity Dialogue	.....
Chapter Eleven	.....
 Consultation Dialogue	.....
Chapter Twelve	.....
 The Ask Dialogue	.....
Chapter Thirteen	.....
 Objections Dialogue	.....
Chapter Fourteen	.....
 Objection Sub-dialogues	.....
Chapter Fifteen	.....
 Thanks & Recognition Dialogue	.....
Section Four – The Future	.....
 Chapter Sixteen	.....
 The Future	.....
Bibliography	.....
Acknowledgements	.....

Foreword

It sounded like a challenging project. I was to meet with the large donors and board members of a notable hospital foundation and ask them for an estate gift. They had all been major gift donors, but had not been asked for a deferred gift from their estates. I had been a gift planner for over 25 years and had secured many current and deferred gifts, but this was different. I didn't know these people and had only one short meeting to lead them through a process and secure a gift commitment. How would I do this?

For fifteen years I had managed a company that used the telephone to contact and ask over 750,000 North Americans to support various organizations with major or planned gifts that secured over two billion dollars in commitments. I had trained all of the callers and helped develop the conversation flows for each of hundreds of campaigns, so I had a lot of experience asking for the gift. But this challenge was different. These were the foundation's best donors. I had no previous relationship with any of them, I had about 45 minutes in a face-to-face meeting to broach the subject, secure support, and close the gift. How should I meet the challenge?

After much thought, I created a strategic series of dialogues, or conversations, which would lead these prospects through a decision cycle. At the same time I had to structure these dialogues in such a way that the prospects would open up, speak freely about their feelings for the organization, and arrive at a very complex and emotional decision. Current research told me that donors are changing, but I now know a lot more about how the philanthropic decision is made. I realized that I needed to devise a methodology that would meet the needs and expectations of the modern donor.

I met with 37 individuals and secured positive commitment from over 75% of them for an estimated cumulative gift value of more than \$50 million. I found the dialogues to be deep and meaningful. The big surprise for me was that after our conversations, many of the donors went to the president of the foundation to thank her for setting up the meeting.

I concluded that these series of dialogues could be a valuable resource for fundraisers. I began to build a complete approach to interacting with the prospective donors to secure gifts, both current and deferred, that empowered donors to decide what they personally wanted to do to benefit non-profits. The results of this effort became this book, *Empowerment Dialogue*. It is written to share this new approach to fundraising with practitioners of all kinds, from the most experienced to those just starting out. I aspire to offer a powerful new way to secure support for non-profits, one that is highly effective and feels natural for the fundraiser while also being empowering and enjoyable for the prospective donor.

Fundraising is a challenging job. I think we need all the tools we can muster to make our work more fulfilling, and subsequently raise more support for our organizations. I hope this new approach to fundraising will do just that.

Here is an outline of the journey we're about to take together.

This book will be divided into four main sections. We'll start with theory and research, beginning with the Why¹ of fundraising. A clarity around the root values of fundraising sets the foundation for *Empowerment Dialogue*. It ripples through everything we are going to do in the book and is our collective starting point. I strongly believe that we must strive to make fundraising a noble profession. Along the way I will discuss why the empowerment dialogue approach has what I call a transactional focus and not a relational.

We will also consider why dialogue is so important given the trends in fundraising and the nature of dialogue itself. Most importantly, dialogue is a key technique in responding to not only what we know the modern donor wants, but also how this donor lives out their philanthropy. This first section examines the environment of fundraising today and lays the groundwork for the rest of the book.

Section two introduces the tools of empowerment dialogue. These tools are the architecture of the whole approach. We will look at the very important cycle of philanthropy – the step-by-step decision cycle behind every gift – so that you, the fundraiser, always know where to go next in the conversation with a prospect. This approach lays out a clear, highly effective road map to secure gifts naturally and easily.

I will introduce the critical ten principles of empowerment dialogue that delineate the structure of empowerment dialogue – the dos and don'ts of how this new approach should work with every prospect. These surprising principles become clear guidelines for the application of this approach to all aspects of fundraising, especially for major and planned gift solicitation. What happens when we bring to reality the cycle of philanthropy while applying the ten principles? How do we use all of this in actual conversations? What kind of dialogues should we have? How do they work? What are the goals and outcomes? When should we have these dialogues, and in what circumstances? You will start to see how you can put this powerful approach to use immediately, either in whole or in part.

Section three, the practice, introduces the basic dialogues starting with the mission and case for support dialogues and continuing through the full decision cycle. I will examine the goal of each dialogue, how to use them in a simple, natural way, and even the actual language to use.

¹ Simon Sinek, *Start with Why* (Penguin Group, New York: NY, 2011).

My goal is that you feel empowered to start using the dialogues immediately. I've included notes from your practice sections along the way so that you, the fundraising professional, can measure your own effectiveness in the dialogues. Many people will find one or two dialogues that add to the great expertise they already have, and others will want to try sequencing several dialogues. Each dialogue is a tool for your toolbox to use as best fits your individual way of interacting with prospective donors.

The final section will look to the future and how we can keep developing and expanding this powerful approach to fundraising.

So that is the journey: section one on theory, section two on the tools that flow from this theory, section three on putting it all into practice, and section four turning to the future and how we might together improve.

In many ways there is nothing startlingly new about the empowerment dialogue approach. Really good fundraisers have developed many of these skills and knowledge through intuition and experience. But here it is in one book – a proven, simple way to empower donors, secure commitment, and respond to the ever changing needs of the donors of today and tomorrow. Whether you want to brush up on your skills or start down a brand new road, I hope this book is beneficial for you.

Oh, there is something else. I sometimes add that there is actually an eleventh principle of empowerment dialogue – that fundraising should be easy and enjoyable for the fundraiser, even fun. I believe that this fundraising approach will be just that for you. I wish you well.



What Fundraisers Are Saying

“The Empowerment Dialogue approach provides a unique way to talk about philanthropy and have a meaningful conversation with the donor. The step-by-step approach helps the donor clarifying their vision and facilitates the decision making process.” ***Martin Goulet, Financial Planner***

The Empowerment Dialogue approach is invaluable in training our volunteer leadership council to have the intentional conversations that they need for very successful cultivation, to create stronger relationships and identify new major donors. ***Susan Relecom, Brain Tumour Foundation of Canada***

Empowerment Dialogue has set us up to dive into the fundraising world with sheer confidence and exuberance! ***Student Philanthropy Team, York University***

“Ken’s training me on Empowerment Dialogue has changed my life!”
Senior Fundraiser for a large international charity

Ken Ramsay



Ken Ramsay is one of the most experienced fundraising professionals in North America and is committed to empowering those who empower others. He does this through speaking, training, teaching and conducting workshops for fundraisers, foundation staff, Boards and volunteers.

He was the founding Chair of the Canadian Association of Gift Planners and led Legacy Leaders for 18 years. Ken now teaches in the Humber College Fundraising Management Course and is a senior consultant with PGgrowth, a full service planned giving consultancy.

Empowerment Dialogue Inc.

www.empowermentdialogue.com

info@empowermentdialogue.com