



DONOR CULTIVATION: CHAT, UNCOVER, ENGAGE AND THANK

As philanthropy leaders, you are overwhelmed with many responsibilities, not only within development but also outside of your departments, hospitals and expanding into the community. Knowing you must meet and exceed your metrics, you may find yourselves overanalyzing strategies and tactics to achieve your financial goals. What if simple, easy-to-follow steps would not only allow you to meet your professional goals but would also allow you to focus on and keep the joy in your roles? While new trends and strategies should be part of your game plans, let's not forget that the small, basic steps can provide great benefits, at little risk, while achieving [Transformative Philanthropy™](#).

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Philanthropy doesn't exist without donors. Evaluate (and re-evaluate) your relationships with your donors. What steps are you taking to better engage them? Consider these back-to-basics steps to advance your program:

- 1** Pick up the phone, make the calls and ask for visits with prospects and donors. If they care about your organization, they will visit with you in person, via video conference or by phone.
- 2** Do your prospects have inclination to give? Ask them how they can partner with you. How do they envision their support of the organization while meeting THEIR goals?
- 3** You already know current donors have inclination and capacity to give. Have you asked them to truly *partner* with you? Have you asked how they envision their support of your organization while meeting *their* philanthropic goals? If not, start those conversations now.

- 4 During chats, ask about their legacy, passions, interests and goals. Use whatever words they are comfortable with; however, keep your focus on the goal—a partnership that combines love of the organization with the alignment of donor goals and organizational needs. Remember, donors should give *through* your organization, not *to* your organization.
- 5 Record all actions, strategies and notes in a shared database. This important responsibility allows for you and others to be aware of current and anticipated discussions and strategies among prospects and the organization.
- 6 Be respectful of prospects' and donors' time. Treat calls and other engagements of their time as gifts to you. Be clear with your agenda and the time needed from them. Follow up with what you promise. If circumstances cause a delay, always share the reason and honor the next set of obligations. Don't ghost your prospects because you don't have clear answers to their questions or expectations. Keep the lines of communication open regardless of project status.
- 7 Thank, thank, thank! Don't let a meeting, donation or volunteer gift go unrecognized. Send a follow-up text or email. There is power in a hand-written note; however, don't delay thanking them just to mail a letter. A prompt email is better than a late hand-written note.

Let's consider these steps in this example:

A large organization received a donation of \$50 from Mr. O. Building the portfolio, the gift officer called Mr. O, although he was not a regular donor or a past patient and lived two hours from the hospital.

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During the call, Mr. O shared his inspiration for giving. After seeing an appeal for donations, he recognized the organization as one that helped his parents after a car accident while traveling. As the engagement continued over time, the gift officer learned Mr. O was a retired engineer and had a philanthropic vision—keeping his parents' legacy alive. His interests included research and technology. After calls, texts and even in-person meetings, the organization aligned Mr. O's passions with organizational priorities around technological needs. Mr. O was able to honor his mother and father, who had since passed, through a \$1M gift to the organization who had helped his parents. He remains thrilled that his gift adds to his parents' legacy with tremendous personal meaning. The organization continues gift impact updates and donor engagement to this day.

This is not a unique story. Following these simple steps work. By engaging prospects and donors, discussing what is important to them AND to your health care organization, following up and following through, you can make great strides. Always consider how the latest trends can work with your organization's goals, but don't forget these simple steps to elevate your program, resulting in joy for your donor, you and your organization.

About the Author: [Heather Wiley Starankovic, CFRE, CAP®](#), is a Principal Consultant with Accordant. She remains inspired by all things within health care philanthropy, with a special dedication to supporting and recognizing staff members along with the desire to create programs that keep talented and dedicated servant leaders within the field. You can reach Heather by email at Heather@AccordantHealth.com or by connecting through [LinkedIn](#).