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how to attract and engage  
**a new generation of  
philanthropists**

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JONAH HALPER

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*I dedicate this book to my wife, Rebecca.  
She constantly pushes me to be my best. Because  
being the best comes easy to her.*

*A special thank-you to Mo Kiss. The book was your idea.  
Thank you for your vote of confidence.*



# CONTENTS

Foreword ix

Introduction xiii

PART 1 Fundraising Confidence 1

Chapter 1 *Be Authentic* 3

Chapter 2 *Be Attractive* 19

PART 2 Soul Mates 39

Chapter 3 *Identifying Your Soul Mates* 41

Chapter 4 *Finding Your Soul Mates* 51

PART 3 Courtship 63

Chapter 5 *First Date* 65

Chapter 6 *Building Trust* 75

Chapter 7 *A Decent Proposal* 89

PART 4 Long-Term Relationships 103

Chapter 8 *Keep The Fire Alive* 105

Chapter 9 *Love & Appreciation* 121

Chapter 10 *Relationship Trouble* 131

Epilogue 145

References 147





## FOREWORD

# Fundraising Is Learned

When I was twenty-one years old, I attended a job fair in New York City for new nonprofit professionals. The organizations represented came from all over the United States and were primarily looking for entry-level fundraisers. I met with four charities, and three of them grilled me on a variety of fundraising scenarios to determine if I had what it took to succeed on the job. I was definitely out of my element, having no experience in charitable work or fundraising.

The last interview of the day was with a guy named Marc from a Baltimore community-based charity. Marc was small in stature, maybe 5'7", but he more than made up for it in sheer force of personality. What was strange about this last interview was its casual nature and little-to-no focus on

evaluating my fundraising knowledge or skills. The interview was basically a casual conversation that covered what books I liked to read, the movies and shows I watched, and even a lively discussion about WWE professional wrestling.

I left that meeting confused, and more than a bit skeptical that it would lead to my employment. So I was surprised to get a call back from Marc, saying he wanted me to work on his team in Baltimore. It was only much later that I had the guts to ask him why he hired me. His response was short and clear. “You had a nice smile and carried a good conversation; the rest you would learn on the job.”


I came away with two very important lessons. One, when hiring new professionals, you hire for potential and not to simply fill a position. Two, and most important, the only inherent skill you need in order to be a good fundraiser is to be a pleasant person. If people like being around you, they will be more inclined to get involved with your cause; and if they are willing to get involved in your cause, they will be more likely to financially support it.

This book has a simple premise: If people really like you, then you can be a GREAT fundraiser. Many of the best practices found in this book would appear to be common

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sense to the experienced fundraiser, but when you break down the fundraising process, you quickly learn how success is defined more by the level of intimacy and engagement you share with a prospect and less to do with all the facts and figures that go along with any high-level solicitation.

So, smile. You are about to learn how to become a great fundraiser.



Jonah Halper, MPA



## INTRODUCTION

# Will You Marry Me?

If I walked up to a random woman on the subway platform and asked her to marry me, do you think she would accept my proposal? Would her body language give the impression that she is open to the idea?

Most likely not.

How about I make the offer more attractive—how about I provide every woman I approach with a list of my credentials and references, all of them pointing to the fact that I am an honest and considerate gentleman who loves children and makes a good living. Would this woman take the data and character references I give her and conclude that I am someone she should spend the rest of her life with, and accept my hand in marriage?

Nope.

So if I am looking for love, soliciting marriage from one thousand women under these circumstances is probably going to be a big waste of my time and energy. I think logic would dictate that even with ample evidence of my being a “catch,” and possibly the best person to be a husband and father, most would not give it more than a second thought before turning down my hand in marriage.

The point here is very simple. Any reasonable person would tell you that marriage proposals only materialize when both parties develop a deep emotional connection with each other, and only then do they arrive at the conclusion that marriage is a very real step they will take together. Without this human connection there is little chance for a shared future.

However, it doesn't sound very logical to make such an important decision, with lifelong implications, by relying so heavily on your emotions. It would seem to make much more sense to treat marriage like a job interview: find the best candidate who shares common values and priorities, and where a mutual physical attraction is present. This would be a much more reliable way of determining a qualified partner. Wouldn't this be a more logical strategy, instead

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of a reliance on developing much more unpredictable and possibly unreliable emotional ties to a person? Shouldn't objectivity be valued above all else?

So now that we have established that most women would decline my marriage offer without a relationship in place, allow me to turn my attention to the gentlemen. What was it that you said during your engagement proposal that got your fiancée to agree to marry you? What were the magic words that prompted a resounding “YES, OF COURSE,” and a breakdown into a watery mess of happy tears?

If you are reading this with any measure of confusion, that's completely understandable. The question is a silly one, since there was nothing you actually said with your proposal that secured a yes from your significant other. The reality is that you already knew the answer was going to be yes before you even popped the question.

Real-life proposals occur very differently than the Hollywood kind. The person proposing isn't worried about the outcome. He knows he is getting a yes from his loved one. This is because the relationship has been developing over a long period—possibly years! The emotional investment over time evolves into more practical aspects of a shared

life: if and when you will have children, if you are going to live in the city or suburbs, if you will be a dual income household, or if one of you will be a homemaker. However, without a deepening relationship, you will never get that opportunity to discuss commitment and marriage. There really is no surprise where you stand with your loved one because you are already true partners.

The point of these analogies is to shed light on the high importance of emotion and relationships in something as serious as dating for marriage. People need an emotional connection before committing to a life together, despite how irrational this may sound.

Successful fundraisers are also aware of this fact. An organization may have great credentials, a proven track record, and efficiencies and effectiveness in its mission, but without the emotional investment of the donor prospect, the charitable support will never materialize.

Getting a gift from someone without having an established relationship with her is indeed possible. However, it will most likely be a “no-think gift”: a donation that doesn’t mean much to the donor, as it’s usually a small sum and done with the idea of getting you out of her office. But



no successful fundraiser operates with the mentality of securing no-think gifts. Effective fundraisers think in terms of long-term, sustainable philanthropic support, and the only way to get long-term support is to seek long-term relationships with your prospective and existing donors. Therefore, the majority of a fundraiser's time is focused on donor cultivation or stewardship, a fundraising term as defined by the CASE Foundation, meaning to "provide a meaningful experience that strengthens the bond between prospect and organization," and most important...YOU, as an individual and representative of that organization (Harris Interactive 2007).

This also means that a donor's financial support isn't strictly tied to the performance of your cause. The cause may not be the best in class. There may be another educational institution better than yours, or a special-needs program that runs leaner and leverages the dollar better. Most of the time it does not matter. Although transparency and efficiency are very important, most donors give based on their feelings, which are largely driven by the relationships in place.

Marc Pitman, a tremendously successful and popular fundraising coach, writes on his blog how statistics can

be the death of a solicitation (Pitman 2013). “Telling an emotional story and throwing in even one calculation can have devastating results on your fundraising.” Marc goes on to share a quote from Chip Heath’s *Made to Stick: Why Some Ideas Take Hold and Others Come Unstuck*: “The results [of pitching with a primarily emotional appeal with an analytical detail] are shocking. The mere act of calculation reduced people’s charity. Once we put on our analytical hat, we react to emotional appeals differently. We hinder our ability to feel” (Heath 2008,167).

The organization that boasts the strongest relationships with its donors will always win support over the organization that only looks good on paper.

Another reason this book emphasizes the importance of donor stewardship is because cultivation and communication have radically changed in the twenty-first century. Our donors are inundated with information, and their attention has become a scarce commodity. We live in a day and in an age when anyone with \$200 and an internet connection can start their own nonprofit. With a myriad of cheap or free tools, this nonprofit can send out e-mails, newsletters, organize events, promote activities

on Facebook and Twitter, and showcase her work on YouTube. This means that fundraisers are competing in a very crowded marketplace full of information, which in itself is competing for the attention of a finite pool of high-net-worth supporters. With this challenge, the importance of developing a real relationship is paramount to successful fundraising. The only way to stand out from the competition is to be the person with the strongest relationship.

So, this book explores the entire fundraising process and shows you that, just like dating, it is about the emotional connection. The greater the bond, the greater the commitment. Whether we are talking about marriage—or, in our case, a generous gift.

This book is sequential: we will explore the courtship process from identifying eligible prospects, to making first contact, to engaging them and ultimately soliciting them for your mission. In order to do this, we need to lay the groundwork with the introduction of two foundational principles that are true in dating as well as in fundraising. All the techniques and best practices found in this book will build on these two factors.

## DATING RULE #1

### It Takes Motivation

A term that gets thrown around a lot in good nonprofit and social circles is passion. We use it to describe our unbridled love for an activity, and the time and energy we dedicate to it. “I am passionate about caring for abandoned dogs,” or “I want to share my passion of origami with you.”

The word *passion* has a very interesting etymology. It comes from Middle English, which inherited it from Old French, and adapted from late Latin (merriam-webster.com). The word in its original Latin form was *pati*, “to suffer.” Suffering is a peculiar way to describe activities you care about deeply. If I am suffering from an experience, how is this synonymous with love of that activity? If an experience causes suffering, wouldn’t I try to avoid it permanently?

The definition of passion goes deeper than describing a strong love for an experience. It means that your beliefs and desires are so intertwined with the experience that you

are willing to suffer for it. Any other person would give up when things get tough (and they do, at times), but because of your dedication to the cause you are willing to suffer through it. You are willing to suffer FOR it.

Successful fundraising doesn't happen easily, or overnight. It requires that you break your teeth on identifying, meeting, and courting new people, and you can't do this if you are sitting on the couch. Dating and fundraising is about putting yourself out there. Unless you are meeting new people and connecting over common interests, there is no chance of having any success with meeting and inspiring the *right* people. When you believe in your mission, this becomes much easier. You are charged by something greater than yourself, and this sense of duty motivates you to make those calls and connections, even when you're too nervous to pick up the phone.

Passion gives you the motivation you need, which helps you remember that you are not asking a prospect to give YOU money. You are asking her to give money to support something important. Something great. Something you believe in to the extent that you are willing to suffer for it.

## DATING RULE #2

### It Takes Time

We've established that a relationship needs to be in place before anyone will agree to make a real investment in you and your cause. Therefore, dating your donors can't be forced or rushed. It has to happen naturally. If it is indeed rushed because of a looming fundraising deadline or other financial challenges, the relationship can be strained and put in jeopardy.

Having a naturally occurring relationship doesn't mean you have to be passive and wait for things to get serious. You SHOULD have a plan to deepen and enhance the relationship, but you also need to recognize that this relationship will happen only if the other party feels the investment to be worth it.

Because of this, a good fundraiser always maintains a pipeline of relationships at various stages of courtship. Some relationship prospects will be new and exciting and very hands-on, but they will not be ready for a solicitation. Others may be long-standing partners who require less

hands-on courtship and ready to give generously of their time and money.

It is therefore the responsibility of the fundraiser to have a good handle on these relationships, to know where they stand, and to ensure that no one jeopardizes them because of short-term financial goals or expectations. The pressure will undoubtedly be there. You will need money to accomplish your mission, to pay your staff, to prove your value as a fundraiser...but where short-term gains sound attractive, they need to be weighed against the bigger picture. Would you rather a \$100 no-think gift now, or would you prefer a \$10,000 pledge when the prospective donor is more entrenched in the cause?

These two rules of motivation and patience go hand in hand. Because relationships take time, you may not see significant giving for a while, but this doesn't mean that you aren't experiencing feelings of success. Many of my successful relationships have been fueled by short-term successes not measured by a financial bottom line. The first time a prospect took a field trip to experience the mission on the ground, for instance. The first time they opened their home for a parlor meeting. The first time they spoke glowingly

about you and your cause in front of their peers. These are all successes, and will help you gauge whether or not you are on the right track. So make sure you are taking the initiative with your many relationships, and understand that the fruits of your labor will, for the most part, not happen overnight.



PART



# FUNDRAISING CONFIDENCE



## CHAPTER ONE

# Be Authentic

There is definitely something sexy about being a fundraiser. You get to meet people who are influential and fabulously wealthy. You attend fancy events, and eat and drink at the finest restaurants and clubs. I half-jokingly tell my friends that as a fundraiser you get to live like a rich person without having money of your own!

The allure of the job is perpetuated by the individuals who are attracted to it. Fundraisers are often social butterflies who love the scene. They are often well dressed and manicured, and well versed in a variety of topics—politics, economics, science, or pop culture—those who can converse intelligently with anyone they meet.

However, successful relationships in fundraising aren't built on these shallow attributes. To attract potential supporters, sexiness can't be just skin-deep. The ability to attract and inspire people to your cause must be rooted in something a lot more valuable than a shared love of golf or Broadway shows. Potential donors want authenticity: the values that dictate your actions that put a meaningful purpose behind the fancy food and cocktails.

Whether you are a professional fundraiser or simply a volunteer, dating your donors represents something much bigger and more important than just you. Asking you to be authentic may sound simple or obvious in our people-person business; however, part of the human condition is a desire to please others. So we tend to change our behavior and even our values when interacting with those we want to impress.

This process sometimes happens consciously. Very often, however, we don't realize how much our actions are influenced by others. The fundraiser must go beyond being an honest and upright person: they must demonstrate authenticity, a core attribute of fundraising. Are you clear about who you are, the cause or mission you represent, and how you plan to succeed with this vision?

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I feel conflicted when friends and colleagues compare fundraising to corporate sales. Although sales techniques and best practices are often comparable to effective fundraising strategy, this is a poor comparison when it comes to describing the soul of the “sell.” In fundraising, you aren’t selling a product based on a prospective client’s perceived need for it. You aren’t trying to sell a vacuum cleaner but rather a vision for a better world. Therefore, the terms product and pitch don’t translate well for fundraising.

Rather, you must connect with the person through the mission and vision of the cause—don’t try to satisfy the prospect’s needs or whims.

## TRAITS OF AUTHENTICITY

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I’m always on the lookout for individuals with good fundraising potential. I no longer run a nonprofit, but I have many clients who struggle to find the best and the brightest, and I often aid them in identifying those who can take their organization to new heights. Interestingly, I can never detect good talent from a résumé, even when it describes

an individual's past roles and responsibilities. The business of fundraising is largely social by nature, and the only way to KNOW if someone has the ability to educate and inspire others to give is by meeting them in person.

During the past decade, I have met some extraordinary fundraisers and have worked alongside a few of them. On paper, my personal definition of a great fundraiser is someone with the ability to find and retain donors—one who believes in the mission and vision of the organization, and knows how to deepen those relationships, which translates into an increase of a supporter's time and money. But in real life, the only way to know if prospective fundraisers have what it takes is to meet them, in order to gauge whether or not they have the authenticity needed to succeed.

So, whenever I present a candidate to a client, I get asked the same question: "What makes the person good?" Well, allow me to share with you what I consider the hallmark traits of a great fundraiser. This is how I determine whether he is authentic, and therefore likely to build a network of friends and supporters.

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## SELF-CONFIDENCE

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**M***erriam-Webster's Collegiate Dictionary*, 11th edition, defines self-confidence as: “confidence in oneself and in one’s powers and abilities.” Self-confident people don’t need to look to others for validation. This awareness leads to poise and charm and, most important, a magnetism that attracts other people—what we often describe as sexy. People are drawn to those who demonstrate confidence, and they enjoy their company. Plenty of people may not have supermodel looks, but because of their fantastic view of themselves and outlook on life in general, their beauty is magnified tenfold.

I often say, “Nothing really changes from high school.” Young adults gravitate toward the cool kids, and the cool kids are the ones who (at least on the outside) demonstrate confidence among their peers. This is particularly noticeable in high school, when everyone is awkwardly trying to discover his or her place in the world.

But nothing truly changes as we get older. Most of us in an office setting can tell you who the cool kids are. They are those who exude energy and confidence in their work,

the ones who can attract colleagues who want to socialize, and work with those who are dynamic and spirited. When fundraisers have confidence, other people want to be around them, they want to work with them, and most important, they BELIEVE in them. If your job is to educate and inspire, then an absolute prerequisite is confidence in who you are and what you do.

## CLARITY

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**B**eing introspective is a learned trait. We have busy lives, and our priorities and values tend to run on autopilot. A good fundraiser takes the time to consider priorities and values, specifically in context of the cause he represents. Do you really care about cancer research? Why? How does this shape your views on science, education, and even politics? The only way to identify others who will share your passion and vision in the cause is to be clear about what you stand for so that you can recognize a good match when you see one.

Compatibility is a universally held necessity when dating in Western society. In this world with so many people,



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it makes a lot of sense to filter down potential life mates to those who share common goals and values. Developing relationships with people who share these common traits will increase your odds of creating a deep and lasting love connection. Also, aside from using compatibility as a way to improve the “systems” of dating, an understanding of common goals and values also helps with the practical aspects of social interaction with new people. We make small talk in the hope of zeroing in on mutual interests, to discuss in greater detail. We look for common ground and then exploit it to help ease potentially awkward small talk so we can get to know the other person better.

So many great romantic comedies are built on the premise of friends who become lovers. Hollywood knows that we can't get enough of that clichéd plotline! In these relationships, the fireworks may not have been there early on, but the feelings end up running much deeper when the compatibility becomes readily apparent to both in the friendship, and so they invest more of their shared time and energy around those common interests.

Compatibility in fundraising is a key ingredient when trying to identify and cultivate supporters. You are looking

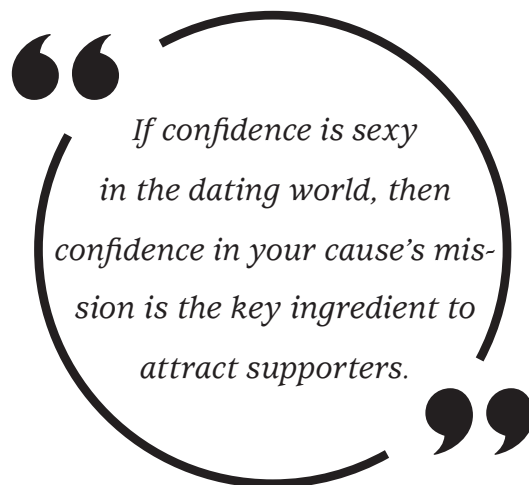
for the right people who share common values to invest in your cause, and you use compatibility to strike up a new relationship in the hope of deepening it over time.

If confidence and clarity are so important to the persona of a fundraiser, let's explore how someone can develop these traits in the nonprofit setting.

## MISSION: WHO YOU ARE

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In the nonprofit world your mission is YOU. It isn't just a cute and concise paragraph appearing on your organization's letterhead. It represents what you are in the business of doing, and what you will not waver from, or change, during the life of your cause. It guides all of your decisions and keeps you focused on your customers. Before you can seek out supporters for your cause, you need to have a clear idea of your mission. Your ability to BELIEVE in a mission shows how you demonstrate confidence.



Having a clear and concise mission is key to your ability to educate and inspire prospective donors. If confidence is sexy in the dating world, then confidence in your cause's mission is the key ingredient to attract supporters. Potential donors will find you sexy! From my experience, the number one compliment a fundraiser gets on the job is not "You could sell ice cubes to Eskimos," or "You are a smooth talker." A gauge of your success in confidently selling your cause is a compliment from an admirer who says, "I see you are passionate about your work," or "I see you believe in the cause."



### DATING TIP

#### CREATE YOUR MISSION STATEMENT

Our goal isn't to come up with a mission statement for your letterhead but rather to create go-to language to use in conversation when introducing your cause to others. Kevin Starr, CEO of the Mulago Foundation and the Rainer Arnhold Fellows Program, recommends extreme brevity for mission statements in the form of eight-word statements (Starr 2013).

According to Starr, this eight-word mission statement should be made up of a VERB, a TARGET POPULATION, and an OUTCOME that implies something to measure. Also, the statement is about

“what” and not “how.” Starr acknowledges the tendency for people to jump into the “how” of making the world a better place because it is what drives their passion, but we first need to determine what change is taking place before exploring how it is being changed.

*Here are a few great examples:*

**Wounded Warrior Project:**

To honor and empower wounded warriors

**Livestrong:**

To inspire and empower people affected by cancer

**The Humane Society:**

Celebrating Animals, Confronting Cruelty

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## VISION: WHO YOU WANT TO BE

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When you are seeking a long-term relationship with someone in your personal life, it is important to know what your long-range goals look like. Do you want to have children? City or country living? Want to be a stay-at-home mom or dad? If your priorities and goals don't align, then you probably aren't looking at a sustainable relationship.

This kind of compatibility exists in philanthropy, too. Although mission is about what you do, vision is about what you want to accomplish: the growth and direction of your mission. You may be in the business of bringing clean drinking water to indigenous people, but what is your vision for this cause? Are you trying to bring clean water to everyone? A region? How do you define success in five or ten years down the road? This is your vision. This is your guiding light.

In philanthropy, you are also seeking a long-term relationship: someone you can call a partner, one who will help you realize your vision, built on common values and vision for the cause. If you share this compatibility of mission and vision, it can translate into years of financial support.



### **DATING TIP**

#### **CREATE YOUR VISION STATEMENT**

This is the fun part—to determine the “how” of making your mission happen. This is your opportunity to get the prospect excited about where you are headed with the cause. Dr. James R. Lucas, a recognized authority on leadership, and CEO of Luman International, states that the vision statement needs enough detail so that you can be held accountable. In other words, are we living up to its standards? (Lucas).

*Here are a few great examples:*

**The Nature Conservancy:**

Our vision is to leave a sustainable world for future generations.

**Teach for America:**

One day, all children in this nation will have the opportunity to attain an excellent education.

**charity: water:**

Our belief is that we can end the water crisis in our lifetime by ensuring that every person on the planet has access to life's most basic need—clean drinking water.

## MISSION & VISION: IN PRACTICE

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**B**en Zander is a famous composer, conductor, and educator. He tours the world as all three, but his famous lectures on education have gained the most attention. His acclaim is based on his ability to tap into his students' potential, inspiring them to live up to standards they set for themselves. A perfect illustration in his uncanny ability to educate and inspire was shared in a famous TED Talk about his philosophy on helping others discover and ignite a love for classical music.

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Ben Zander once discussed with industry heads and experts in the world of classical music the financial struggles of a symphony orchestra. A gentleman commented that many financial woes would be eliminated if classical music could be marketed in a way that increases exposure and appreciation by 2 or 3 percent; the result would have wonderful implications for this growth on the business of classical music.

Zander chimed in to say that this was no way to market and sell classical music and the symphony orchestra. If you approach the issue by assuming that only 2 or 3 percent of the population likes classical music, you are implying that 97 percent of the population would have no desire for it and no interest in your cause! You can't educate and inspire people, unless you operate with the attitude that "everyone loves classical music, they just don't know it yet!"

Think about the far-reaching implications of this statement. Educating and inspiring others is born out of confidence in your mission. If you can't get excited about your mission, then you will never succeed. You must fully embrace your cause, warts and all, knowing that everyone will love it. In fact, the best compliment a fundraiser can get is that "I see you believe in the cause."

So, throw away your script! You don't find confident people rehearsing what they will say on a date. You need to be yourself, and to be natural. If you focus on sharing your dreams and look for common interests and priorities, you will succeed in finding and keeping new donors.

## **PRIMARY VS SECONDARY CUSTOMERS**

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**N**ow that you feel confident in your mission and vision, it is highly important not to lose sight of the forest for the trees when fundraising. Your organization's integrity is directly tied to the mission and vision, and it relies on your serving your primary constituency first: the people you serve and the reason for your existence. You can't put the needs of donors, politicians, or media above the people you represent. It may serve short-term value, but, if you make a single decision at the expense of your primary audience, it will not go unnoticed and will do much more damage long term to your brand, your relationships, and your integrity.

In 2003, Nancy Lublin transitioned from being founder and executive director of Dress for Success to a near-bankrupt teen volunteer organization called DoSomething,



founded in 1993 by *Melrose Place* actor and celebrity, Andrew Shue. With 13 teen centers across the United States, DoSomething had the opportunity to obtain a \$600,000 donation from a company, with the stipulation that this new center be opened near its corporate call center. Nancy Lublin turned the money down.

In near shock, the board of directors pulled Nancy into the offices and asked her if she were making decisions in the best interest of the organization. Nancy reaffirmed her commitment, and told them in unequivocal terms that this decision of turning down the money was in fact putting the teens first. Nancy



Photo by TED Conference

Nancy Lublin

then doubled down and closed all the teen centers that were in operation and reintroduced teens to DoSomething.org, as an online platform for teens.

Nancy understood that by making her primary constituency (the teens) a priority, DoSomething.org would provide a more natural place for teen engagement and involvement,

and that companies would buy into this vision. Today, the majority of DoSomething.org's \$13 million budget comes from corporate philanthropy that seeks to align its brand with the established and laser-focused mission and vision of DoSomething.org.

## CASE FOR GIVING

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When an organization or fundraiser discusses “the case for giving,” what they are describing is the pitch, which reflects the mission of the organization, and the vision for accomplishing the mission. This distinction between mission and vision is very important in fundraising. You may stand for certain principles and have an admirable mission, but the best donors are investors, and they are playing the long game. They want to know that their investment is going to have long-term implications, and they want to be part of the solution. Your case for giving echoes this vision: *Partner with me and help me realize the shared vision for our cause.*

Effective fundraisers understand that not everyone is a realistic candidate for supporting your cause. Although your approach and attitude should say “Everyone will love

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my mission and my work,” your practical efforts to identify and cultivate donors should be more focused on those who would be inspired and motivated to act on your case for giving. In this manner, you maximize your time with the right people. If you represent a charity that supports children who are fighting cancer, then finding donors who value children and health should be your biggest priority.

Your job is to lure the right prospects in with your confidence and then inspire them by your mission. When they get more involved and learn more about your vision, and how they can be a part of that growth and accomplishment, you are well on your way to developing a long-term philanthropic relationship.

So, the next time you have to explain who you are and what you do, come up with a clear and concise message that properly demonstrates WHAT you do, and HOW you do it. Then you will have the confidence and clarity needed to find partners and supporters to join you in accomplishing your vision.