

Thinking Long, Working Short — New Meaningful Philanthropic Relationships

By *John Traver*

There are so many different techniques and alternative approaches to building relationships with potential major gifts contributors that it is sometimes hard to know where to start. In this case you will benefit immensely from embracing the change axiom: *Think outside the box of what you always have done.*

Yes, you feel the pressure of the daily internal YMCA activities. However, in order to grow your YMCA's philanthropic support, you also need to focus some time and energy on long-term cultivation and building connections with potential major gifts contributors.

So, let's start with whom you know, whom you should get to know, and what you can learn about them. Every YMCA CEO and financial development officer will benefit from continually keeping a set of written (or electronic) top ten lists.

Here are some of those: The 10 largest contributors to your annual support campaign; the 10 wealthiest families in your service area; the 10 largest single owner of family businesses in your service area; the 10 CEOs of the largest corporations in your service area; the 10 wealthiest parents of children in your YMCA's programs; the 10 most influential/powerful families in your service area; and the 10 people who exhibit the most commitment to your YMCA.

You need to constantly look for ways to connect one-on-one with each of the people on these lists in order to enhance your personal relationships. One effective technique to ensure personal time with someone is to seek them out at service organization meetings (Rotary, Chamber, etc.) or other gatherings.

Prepare yourself to ask conversational questions such as: "Did I hear correctly that your daughter is now attending college on a soccer scholarship?" or "How is your new business (or position or product, etc.) going?" This implies you have done your homework by searching for something close to their heart to discuss with them.

The key is to open the door for them to tell you about something that really matters to them. This is better than asking them about the weather if you want to build a meaningful relationship. Your goal needs to be oriented to finding ways to start bonding by sharing memorable experiences that tie them to the YMCA on a personal level.



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One of the first, most important ingredients of starting a new relationship with a person or family from your lists is to make a pleasant, friendly first contact. You need to prepare yourself to honestly extend yourself in a loving, accepting way. "Look for the good" in the person, even if you have heard they are aloof, quiet, cold, unapproachable, or unfriendly.

Your goal after those initial first conversations becomes learning more about their family, personal interests, and values. Most all successful YMCA directors have learned this skill of cultivating personal relationships with prospective major contributors. Years later, after you have developed these relationships, you will be amazed at what people will remember about your first interactions.

They will tell you exactly how they met you, what you said, how friendly you were, and even what clothes you were wearing when you first met. The old adage is true that "YMCA executive directors are always on stage."

The next step to breaking the ice includes finding ways to involve them in warm supportive relationships within the YMCA family of staff and/or volunteers. One approach to utilize with community and business leaders is to seek their advice on a special project or initiative. For example, invite them to participate in your YMCA's Strategic Planning process. If you think asking them to join in the meetings is too much, set up a 10-15 minute personal visit at their office to share and review a draft copy of your written strategic plan.

This is a very appropriate request on your part for their help since most businesses update their strategic plans annually. Watch your time and when the 15 minutes is up, make a move to leave. If she/he asks you to stay, do so, but again respect his/her time. Try to have a follow-up telephone or in-person conversation after a few days outlining one or two things you have changed based on the person's input. You will have "set the hook" in the process of building a strong, committed relationship.

PROSPECT STRATEGY

All of these cultivation steps feed into your prospect strategy which should include a planned, on-going series of contacts based on their individual interests and relationship with your YMCA. Again, sending thank you notes, calling to share an exciting development or to personally invite them to a YMCA event, or sending them a YMCA scholarship story related to their interests, are all effective ways to maintain your connections and build your relationships.

So far, we have been discussing what the CEO and/or CDO can do to develop and enhance relationships with prospective major donors. You can speak from experience as to what you would like others to do in order to broaden the prospective donor cultivation and relationship building activities.

Involving your key staff and board members can help you expand and enhance your potential major gift contributors. Confidentially share the

names of those with whom you do not have a relationship on your top 10 lists. Perhaps a board member already has a relationship with someone with whom you've not been able to connect. Or, one of your YMCA staff knows the special interests of someone on your list.

Individually work with your staff and board to determine who knows whom and what the best strategy is for connecting with that person. Who could see whom at church, the golf course, the theater, a formal dinner, the symphony, or at a luncheon? Cultivation can include a gentle reminder that "I work at the Y" or "I am on the board at the Y," but should not include an "ask" for a contribution to the YMCA.

Ultimately, once you become comfortable with this process, your approach to your major gift prospects will be as individual as your prospects themselves. Enjoy the relationships that you develop. They will enrich your life as much as they enhance your YMCA. **P**



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