

Staying Near, Dear, and Clear

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Motivation is a critical element in the charitable giving process. You can identify suspects and prospects, but what finally motivates an individual to make a particular gift?

During the post-Hurricane Katrina giving period some charities experienced a boost in giving while others faltered. A similar pattern was observed during the fall of 2001 after the market tech bubble burst and the events of September 11. At that time, we observed several factors that we thought influenced charitable giving during periods of change and uncertainty.

This year has seen financial turmoil of the sort that has been characterized as a once in a lifetime occurrence. Many are worried about how this will affect their fund-raising efforts in 2008, 2009, and possibly beyond.

We believe that now, as always, for maximum effectiveness in their fund development efforts, nonprofit organizations and institutions should strive to be “near,” “dear,” and “clear” to their donors. Here are some strategies to help achieve that result.

Stay close to donors

Many charitable organizations, especially those that are national or international in scope, may have trouble achieving the goal of being near many of their donors. Some organizations have countered this problem by establishing local chapters or affiliates around the country or opening regional offices. But this is not an option for many groups, and may not be necessary for others.

If your organization is not physically close to many of its donors, it is important to strive to make it seem that the organization is closer to them. This can be done in several ways—ongoing communications efforts such as newsletter updates, phone calls, and personal visits when possible are all good ways to bring your organization “closer” to your donors. Many colleges and universities sponsor alumni dinners and other events in various cities, for example. Other types of organizations reach out to their constituents through television commercials and other media. Websites can make an organization seem very near and accessible as well.

When your donors are not nearby, communicating with them and keeping your organization “close” to them may be more difficult but no less imperative. With a proper strategy for keeping your donors informed about your work, you will not be

“out of sight, out of mind,” and donors will feel closer to you no matter what your address happens to be.

Are you dear to them?

Something that is dear to you probably didn't become dear to you overnight. It took time and serious interest for emotional attachment to develop. It is rare, for example, for a donor who has not been involved with an organization for a significant period of time to include it as one of the charitable interests named in his or her will. Since time is involved, “deariness” may be the most difficult of the three goals for charitable organizations to achieve.

In our experience, almost any type of nonprofit entity can form strong ties to donors. For example, many alumni donors to educational institutions have traditionally felt their college years were among the best of their lives, and their gifts arise from that sense of nostalgia. A challenge now faced by some institutions is the fact that large numbers of potential donors among the baby boomer generation remember their campus years as ones of turmoil and unrest. As a result, some institutions may not be as “dear” to this group of alumni as they may be to those who preceded—and followed—them.

Religious-based organizations and institutions are often dear to their supporters because of deeply felt spiritual motivations. These can be based on personal experience or a desire to further the mission of the organization as it reaches out to help others. Charitable activity in our society, as elsewhere in the world, is rooted to a large extent in religious teachings and it is important to understand and respect the tie this can build to any number of types of causes.

Cultural institutions can also become “dear” to their donors. A development officer once told the story of a woman who visited her zoo every day when the weather permitted with an attendant who helped her traverse the grounds in her wheelchair. When asked why she came each day she stated that her son had been killed in an accident some years before and her best memories were the time she spent with him as a child at the zoo. A short time thereafter she passed away and left a significant sum to the zoo for an endowment in memory of her son. This is just one of the many examples of how an organization can become “dear” to those it serves.

Donors to health-care providers were often patients themselves or had a family member who was treated there or benefited from research conducted, and they want to do all they can to help a cause they believe saved their life or that of a loved one. In these cases, “deariness” also comes from deep emotional attachment to an organization and its mission. Rising costs of healthcare may compete against other motivations, so it is imperative that charities continue to make their case, even with those who appear to be most dedicated.

Those involved in charitable gift planning quickly learn that, in most cases, a prerequisite for the completion of bequests and similar gifts is an emotional or other attachment that will sustain the donative intent necessary to elevate a charity to the status of a close friend or family member. This will be even more likely to be true as estate tax motivations become less of a factor for the vast majority of Americans this year.

Make your mission clear

Would you feel comfortable giving to an organization if you weren't quite sure what it did, whom it served, or the nature of its mission? Probably not. That is why it is imperative that, no matter what your mission, you must make sure it is clear to your donors and potential donors.

Just because your organization's mission is relatively specialized or even unique doesn't mean that there aren't donors out there who are willing and able to support it. Every charitable organization in existence today exists because someone supported it and believed in its mission. So, from the most obscure to the most well known charity, the goal is to state your case clearly so that donors know what their gifts will be supporting.

Without a clear, understandable mission, an organization may find itself floundering due to confused donors, or worse, lack of them. This is especially challenging for organizations that have in years past acquired older donors based on one mission focus and are now attempting to change that focus to acquire a younger base—without losing the clarity of mission that is required to maintain the existing donor base.

In light of economic events this year, the continuing wars on terrorism, the election, and other changes, many Americans are reevaluating their core values and in some cases willing to give more to charitable interests that represent to them a material manifestation of those values.

Now may be an especially opportune time to stop and return your focus to the basics of fund development—making sure you are as *near* to your support base as possible, you nurture and respect the relationships that keep your institution *dear* to donors, and make sure you are sending messages that make your mission *clear* to those who would choose to act through you to direct their monetary resources for the benefit of others.