

## **Dining with Donors**

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We have long been surprised that the activity most fraught with potential for disaster in donor relations is never discussed. No one gives beginners tips on it; no one writes essays for experienced fundraisers pointing out how to do it better. Everyone assumes that, at some point long in the past, one of our parents took us aside and told us all about it. As experienced adults, we forget that it just does not come naturally to all of us. And some of us, no matter what our age, still do not know how to do it right, though none of us will ever admit it.

And for those of us who work in planned giving, knowing how to do it right—knowing the mechanics, knowing when to say “yes” and when to say “no,” knowing when to stop even when the donor is having such a good time—is even more important than for people in other professions because we do it so much and because it is such an important part of our job. We have been, alas, on our own until now. Yes, finally, in this little essay, we will reveal the rules of . . . Eating with Donors

We all know that the best planned giving often takes place over food—in restaurants, in a donor’s home, at a private club. Civilizations millennia ago knew that sharing food built trust. There is a reason that bread and salt are ubiquitous symbols of hospitality and acceptance. When we break bread (or pita or burnt cinnamon sugar toast) with donors, they come to trust us. And building trust is a crucial part of being a successful planned giving professional. As we know, in our conversations over food we raise ideas that donors, often, have never heard or thought of. We need our donors to trust us when we start spouting strange acronyms like CLATs and CRUTs.

Yet—trust us!--many fundraisers do not know how to eat with donors. Yes, correct Eating with Donors is different from eating with family, or colleagues, or strangers. We have to observe all the (unwritten) rules of behavior. Our jobs can suddenly disappear if we violate the (unwritten) rules.

Our most important rule is fairly obvious: Do not mistake Eating with Donors with eating. Eating with Donors is not about the food. Many beginners in the field make the mistake of thinking, with pleasure, about all the wonderful restaurant meals that await them. But most restaurant meals, especially if the donor selects the restaurant, are disappointments. How many times has the donor chosen the DoubleTDiner instead of the lovely French bistro? Or how many donors think Applebee’s is upscale dining—especially the Two Meals for \$20, if served before 4:30 p.m.? Or worse, how many times has a donor suggested “oh, let’s just eat here at my home tonight; I have a beef stew left over from earlier in the week. . . . if you don’t mind?” Of course we mind: we wanted something good to eat. Thus, we must remember: this is not about food; this is a business meeting that my employer is paying for so that I will move a gift a little further toward completion.

Just as beginners in planned giving can be mistaken about the purpose of a meal with a donor, beginners can also make grave errors during a meal. To help, here is a simple list of Don'ts and Do's for your next important meal:

### **Do not**

- Ride w/donors to restaurants; always meet them there. Many drivers love to show you around and most of them drive either (way) too fast or (maddeningly) too slow. This rule is particularly important for those planned giving professionals who suffer from motion sickness. Arriving at a restaurant white and shaken (or worse, rushing to the restroom) is not an auspicious beginning.
- Select (if you have the option) a restaurant with music—especially loud music—playing. Remember everyone who is 60 or over is experiencing hearing loss (despite their denials) and the first loss is the ability to hear clearly when there is background noise. You will know you have chosen poorly when the donor just smiles and nods to all your questions.
- Order messy stuff--no spaghetti, no chicken wings, no ribs—nothing that drips on you, (or worse) on your donor.
- Drink anything but water/coffee/herbal tea unless the donor goes first with something stronger.
- Overindulge. Even if the donor goes first, saying “what is a meal without wine,” limit yourself to one glass.
- Spend a long time looking at the menu. You are there for the gift, not for the food. Learn to speed read to find at least one dish you can bear (chicken is usually safe, as is penne pasta with vegetables—no red sauce!).
- Pontificate—or even bring up politics or religion. You have probably already figured out to avoid politics (especially if you are a Democrat) or religion (especially if you are an agnostic). Never assume that a spirited argument about religion or politics is exhilarating to donors. We have yet to meet a donor who was “exhilarated” by hearing opposition to his views.
- Forget why you are at this dinner. You are not on a date, nor part of a pleasure trip; you are working and your job is to move a gift along. Period. Find a good moment to say “I am so glad that we have this time to talk more about the details of a flexible DCGA. I have some illustrations I would like to show you now. . .”

### **Do**

- Break the conversational ice by inquiring about grandchildren—always a safe topic, should such grandchildren exist. Note that grandchildren are a much safer topic of conversation than the donor's children, who are, by nature, flawed

- Order messy stuff (with favorite donors) to let them know *they* are special; *they* are “family.” Keep in mind, though, that they are *not* family, that your job is still to move a gift along. But letting someone know that you will break “the rule” for him always makes a donor feel good.
- Take cues (about food, drink, conversation) from the donor. When the food comes, pause to see if the donor wants to say grace; always pause before eating anyhow until the donor begins. Remember what your mother taught you: always wait for the hostess to take the first bite? Well, do the same thing here. We know people who have lost their jobs as planned giving specialists because they rushed into every meal, eating/drinking without looking to see if the donor even had her food, let alone if she wanted to say a brief prayer of thanks for her food.
- If out to dinner with single woman over 75, order a relatively expensive item on the menu so she can too. If she says “oh that’s too expensive for me” (and she will), say “nothing is too good for you.”
- Order dessert if the donor says “oh I would love to have that chocolate decadence cake, but I am too full.” No one mentions dessert unless she wants it, so realize the subtext and just order away (mentally acknowledging without sullenness the extra 25 minutes you will have to spend on the Holiday Inn Express treadmill).
- Let the donor pay, if he offers. Some people will be insulted if you pay (though you should always offer, unless at their club), but, a cautionary note: some will see their paying as their gift (their only gift) to your charity. If you can figure out who those people are, make sure you pick up the check.
- Travel prepared for disaster. If, no matter how well you have followed the rules, you end up at The Dinner From Hell (and you all will at some point), make sure you have packed several small bottles of your favorite liquor in your quart-sized baggie (we know from personal experience one can go through security with eight little bottles); think ahead and fill up your baggie with these bottles instead of non-essentials like toothpaste or deodorant. Thus, when you are sitting at a dinner with a couple who have told you they are never giving your college a gift again because all the faculty are Communists, that (ha ha) women can never understand the intricacies of planned giving . . . just think: *soon I will be back in my nice hotel room with all those little bottles*. For an extra treat, bring along your favorite snack: Macademia nuts? A Milky Way? Cheetos? --something that gives you comfort while you sip and chew in bed, repeating, over and over *I never have to see those people again. Ever*. And don’t.
- Say goodbye by offering a friendly hand (to eliminate any unwelcome hugs). Some donors have perfected the unexpected way-too-close goodbye hug (often accompanied by way-too-much wine). Forestall all that with your outstretched hand (ready to shake or to push away, whatever is necessary).
- And finally, plan the next step with the donors that will, most probably, take place, once again, over food.

Keep in mind that somewhere out there, in some food limbo, lies the perfect meal: Butter-poached lobster, perhaps? Sweetbreads in a riesling reduction? Pasta with a rich gorgonzola sauce, accompanied by a bottle of 96-point rated Russian River Valley Pinot Noir? It can all be yours . . . but only by Eating *without* Donors.