

[Even More] Dining with Donors . . or Clients . . or Anyone Else Important to your Career

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Was it only seven years ago that we wrote our first “Dining with Donors” column for *Planned Giving Today*? In the ensuing six years, though it may be hard to believe, so much has changed in the dining out world that we believe we need an update for the closing months of 2016. Yes, some of the most important planned giving meetings still take place over meals . . . and yes, we still need to follow the (almost always unwritten) rules of dining out-for-dollars-etiquette. But we need new rules for our new donors . . . and we present them to you, raising our glasses to toast to good meals (and new gifts).

One of the pleasures of writing for *Planned Giving Today* is that people read the articles (!) and then want to talk to us about them. Over the last six years, we have heard dozens of PGT’s readers talk about their own dining with donors’ nightmares. In fact, one of our favorite dinner conversations with our planned giving friends is “ok, what was your worst-ever meal with a donor?” Some of these stories, such as the one involving a kitchen breakfast meeting and an adult diaper, are unprintable in this “family” newsletter (but you can ask us about it over a glass of wine).

Valuable as these dining nightmare stories are as entertainment for late nights at planned giving conferences, they do not eliminate the need for all of us to keep in mind how *we* should behave when dining with donors.

Some of our rules have not changed. We all need to remember why we are meeting with a donor for lunch or dinner—or even coffee and bagels. Whatever our reason—ranging from stewarding a legacy society donor to trying to explaining a complicated real estate pooled income fund—we must remember that our meeting *is not about the food*. We are having a meal for the donor’s benefit. Not ours.

The other important rule that has not changed is the other truly important one: we are at the meal to listen to our donor. Most of us probably already know this, but good listening is difficult to do, especially if one is hungry and waiting for the donor to take the first bite (or say a prayer, or slowly sip water as he tells a long story). Don’t we all believe, in our heart of hearts that no one really listens to us? And that no one appreciates us? Part of our job is to be that person who does appreciate and does listen. And telling and listening to stories over food, we now know, activates the brain in ways that help us secure a gift (note: see PGT March, 2016 for evidence).

We are pleased that the key principles for dining with donors remain valid—and we expect these rules to hold true for some time to come. But we all live in a changing world, replete with new technology, new habits, and...

New Donors: Many of our new donors are now young people (well, yes, we define “young” as “under 60”) who eat out all the time. Dining out is not the treat it used to be (or that it still is to those bound by a mandated cafeterias--college students or retirement community residents). For these younger donors, we suggest:

- Letting the donor pick the venue. Yes, this goes against what is obvious to all of us—selecting (ourselves) a restaurant where we know there will not be loud music and/or obnoxious groups of conference attendees--but all restaurants seem to have loud music these days. Once you know where you are going, do call the restaurant and plead for the table in the absolutely quietest corner. Repeat the request when you arrive (yes, surreptitiously of course).
- Finding a reason to ask the donor’s advice about something happening at your nonprofit. Gone are the good old days when a donor would just hand over a check saying, “I know you know what’s best, so here is a little money.” Asking about a new type of planned gift your organization is thinking about marketing is a plus—for you and for your donor. Who does not like to be asked for advice? And planned giving offers any number of opportunities to ask donors how best to explain some of those opportunities to other donors. In the process, you have a chance to explain the idea to the donor across the table too, and—who knows—she might be interested herself.
- Not noticing or commenting on donors who wear their baseball caps backwards and their t-shirts untucked. “Dressed up” seems to have no place in today’s restaurant scene. I realize that we are sounding like our mothers, but . . . maybe they were right (well, about dressing for a restaurant meal at least). And what’s up with these young women—dressed in glamorous black with heels and upswept hair—joined by one of those backward cap boys in a t-shirt, shorts and flip flops? Since when did men wear flip flops to nice restaurants (yes, we *are* sounding like our mothers). We do need to be blind about appearances (and that includes nose rings, tattoos, and various other (sometimes galling) piercings).

Inviting that New Donor to a meal: It used to be so simple: we just picked up the telephone and made a quick phone call that went something like “I am going to be visiting in your area in two weeks, and I hope we can meet for dinner.” (Of course we all know that “visiting in your area” almost always translates into “if you and a few others will agree to see me”). So we spoke to a person or left a message and then . . . heard back. Or did not, and thus knew that the person did not wish to see us.

But now . . . who uses a phone anymore? And which (of many) phones to call? One of us has not answered her landline in over three years—woe to anyone who has left an important message on it. Or should we text instead . . . and get an instant reply? Sounds promising, but does the particular donor we wish to reach text? And what about good old e-mail? So untrendy for truly young donors but the staple for many of us doing the calling. Maybe we should try them all—the old (or new) multi-media gambit.

New Restaurants: not only are new donors populating the landscape but new “casual fast” restaurants are feeding those new donors . . . at the speed of light. Standing in line to order at a Panera or a Taco Cabana and sitting next to a booth filled with happily sticky, gurgling (or crying) babies, is not conducive to any kind of good business meeting and that is what dining with a donor is—a business meeting. Thus we suggest

- Avoiding (if at all possible) any restaurant where you have to stand in line to order and bus the leftovers yourselves. You might have to say to your donor “please pick a place that is quiet where we can have a good conversation.” Meeting in an office, where you bring the sandwiches, is far preferable to the cacophony that often permeates these new upscale fast food restaurants. Yes, we admit that we do sometimes find ourselves settling into a booth at these very places (maybe it’s the free Wifi?) but never with a donor.
- Being careful in all the new “small plate” restaurants. We all know that these “small plates” are meant to share (as Tiffani, your ever-smiling server for the evening will tell you), but will your donor want to share? Will she or he be feeling uncomfortable with sharing? And we all probably have experienced the moment(s) of indecision in such places when the collective table spends far too much time contemplating the myriad options on the menu, trying to figure out what everyone might like. We must learn to follow the donor’s lead, no matter how much we wanted the smoked eggplant with roasted cauliflower. Whatever he picks will be just fine.
- Accommodating ourselves to the new bar scene. Many of the trendy restaurants our donors frequent have even more trendy bars, with special drink menus, even more detailed than the bar food menus. Trendy bars, even more than trendy restaurants, tend also to be noisy and crowded, and populated with high bar stools. And who is the world designed all these bar stools with no backs? Is this the way to spend an evening? But perhaps that is the point; bar stools are designed to encourage us to drink up and move on. But with donors we might not want to “move on.” Thus we need to be prepared to suggest an alternative when we have had our drink at the most popular wine bar/bourbon bar/craft beer bar in town.
- Enthusiastically enjoying the new Vegan Kale Surprise menu that your donor suggests will thrill you. Not thrilled by kale? Or vegan? Well, we just have to get with the times, don’t we? At least we can rejoice that the beet revolution is almost over.
- Adapting to the seeming proliferation of allergies and so many foods to avoid. Donors—and clients—have now discovered some of the reasons they had upset stomachs and unexplained rashes in the past. Lactose intolerances and gluten allergies are now very much part of the dining experience. We need to smile pleasantly when our donor orders “only a small salad, no dairy, of course, and no wheat—rice crackers would be fine--oh and please only imported Korean green tea. Our donor’s comfort and pleasant memories of the dining experience should be our focus. We must put that picture of a rare burger completely out of our minds.

- And while eating that kale surprise (surprise—beets! too!!), make sure to ask about the health benefits of such food. And remember to listen (the true test for listening is not to be thinking of red meat while someone glows vegan). And we can't grimace when our donor tells us that gluten and dairy is the leading cause of cancer in the United States.

Subjects to avoid: yes, there are more now than even a few years ago

- Politics: We all know we should avoid talking about politics and religion, but we find it particularly difficult these days avoiding politics, as everyone seems to have a (strong) opinion about our upcoming presidential election. Try your hardest to resist, though. No good comes from making your case for your candidate. Trust us, your donor will not be enlightened by your point of view. . One of our most cringe-worthy moments came when one of us heard the other (no, we are not telling you who is who here) happily argue—for over twenty minutes, thinking this was an intellectual exercise that the donor would appreciate--with a major donor about whether weapons of mass destruction really existed in Iraq. The other saw the train wreck coming, but could not figure out how to interrupt. Unhappy ending: major donor never gave another major gift; our lesson: always, always avoid politics. And learn to rudely interrupt.
- Your own children and grandchildren. No one want to hear about your kids—especially the accomplished ones. You are there to listen to stories about your donor's progeny. If you must say something about yours, make sure your story focuses on something they do not do well. Stories of amusing failures are all we (as hosts) should tell.

The new Social Scene: And yes, many of our long-time donors will want to avoid that kale surprise as much as we do. But the new food scene can be fun . . . and you can be part of it by

- Being open to all the new food-centered places to meet that might offer a treat instead of a meal. What about suggesting cupcakes? Or a juice bar? Or a wine bar where you can sample small portions of the latest vintage? Or someone's screened-in back porch, which we have found works wonders with almost everyone?
- Learning to like bar stools (perhaps by doing back exercises to prepare)? The bar scene is creative and sometimes an inexpensive treat, where you can often save considerable money during special “bar hours”—now often late as well as early.

Dining out is certainly one of life's pleasures, and in the development business dining is both a professional necessity and an opportunity to experience a broad range of culinary delights and, well, potential problems. If the problems overwhelm the delights, though, do not forget to bring those little bottles of rum, gin, scotch--whatever your favorite—in your carry-on bag (true experts can fit in at least three, along with a Snickers, in a quart bag).

Often, of course a meal—no matter how pedestrian or how delectable— results in renewed donor enthusiasm and in progress toward a new gift commitment. We all crave that outcome. Following a few simple rules—and preparing for the new conditions in which our professional dining might take

place—can create a whole new set of these “perfect” meals. And some of them might even taste good too.