

Overly Friendly Donors: Possible Problems and Sage Advice

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“Shall we go shopping now? I know a dear little store not far from this restaurant and I almost never get out . . . then, we can go back to my apartment for a nice cup of tea and look at all these materials you want me to go over.” Emma, age 81

“I have two tickets to the latest Stoppard play that happen to coincide with your visit to New York. Will you join me for dinner and the theater while you are in town?” Jack, age 52

“Oh, please bring your husband with you when we have dinner next Weds. night in Sarasota. My husband and I would love to meet him.” Jean and Joseph, age 58 and 60
Our job, sometimes, is to be nice. Knowledgeable of course but also nice. So requests like the above seem so innocent, so easy to fulfill. Why not take Emma shopping? After all she promises to look at the materials when you are done. And why not go to the theater with Jack, a handsome trustee, who happens to have tickets to just the play you would love to see? And why not invite your husband along to meet that nice faculty couple, Jean and Joe, whom you enjoy being with so much?

Why not is very simple: you are not being paid to further your friendships; you are being paid to be a professional fundraiser and professional fundraisers do not, during working hours 1. Go shopping or 2. Go on a date w/out spouse or 3. Go on a date with spouse.

Yes, I see many of your raised eyebrows: doing what prospects and donors want *is* being a professional fundraiser, you are saying. Emma will appreciate a shopping expedition; Jack just wants to show me a good time while I am in town; Jean and Joe would love my husband.

I would like to argue that such behavior is not being a good professional: it is not appropriate to become friends (or more!) with your prospects/donors. Shopping, theater-going, dinners that include spouses should not be part of any planned giving officer's duties. The reason why is simple: the closer you become to your prospect, the more difficult it can be to ask for a gift. The more shopping expeditions you go on, the more the line blurs between “she is such a good representative of ABC Charity” and “she is such a good friend.”

What happens, then, if you take a new job? What happens if Emma's requests escalate (“Dear, no one is shoveling the snow off my sidewalk these days”) or Jack's intents are not completely honorable, or your spouse spends dinner arguing to eliminate the “death tax” to a couple who are devoted to social responsibility?

Here is my sagest advice: reframe Bartleby's famous sentence ("I would prefer not to.") into your own language:

- "Oh how lovely; I am so sorry I will not be able to go shopping with you today."
- "I wish I could go to the theater, but I cannot. My time in New York is filled with visits to other potential donors. When is a good time for you to go over the proposal I sent to you?"
- "We have so much to talk about that Harvey will have to stay home; I just can't concentrate on your goal of setting up a scholarship if Harvey is along."

Please note that in some ways the ages and genders given in the first examples are red herrings. It simply does not matter that Emma is female and 81; spending the afternoon shopping with her is not, should not be, part of what a professional fundraiser does. It also does not matter if you think Jack is handsome. What does matter is that accepting the theater tickets gives Jack the illusion of going off with you to have fun, not work for the charity you both want to support. And finally, spouses—no matter their gender—have no business being part of a business meeting. And ultimately, that is the key. We are there because we have business to conduct, business that involves a lot of what is often very gratifying interaction with committed and generous donors, but business nonetheless. Part of the emphasis in recent years at many development offices on "moves management" is designed to reinforce just this perspective. Each visit, each "touch" should "move" the process of donor cultivation in some way closer toward a gift. No matter how pleasant our visits are—and I hope most of them are very pleasant—they should all keep this key maxim in mind and should be planned accordingly.