Diversity, Equity & Inclusion Series:
Prospecting for Diverse Major Donors

Wednesday, June 19, 2019
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Trainer, Sanford Institute of Philanthropy

Moderator
fundraise

YOU’VE GOT A CAUSE. LEARN HOW TO FUND IT.
OUR AFFILIATE PARTNERS

- City University of Seattle (WA)
- John F. Kennedy University (CA)
- National University System (Founding SIP)
- Maricopa Community College District (AZ)
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- Iowa Wesleyan University (IA)
- Howard University (D.C.)
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- Albany State University (GA)
- Xavier University of Louisiana (LA)
- Xavier University of Louisiana (LA)
- Long Island University (NY)
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The Cause Selling Cycle

Phase One
Phase Two
Phase Three

THE EIGHT-STEP CAUSE SELLING CYCLE represents the steps good fundraisers take to become great fundraisers!
How to find qualified donors
TODAY’S THOUGHT LEADER

Armando E. Zumaya

Vice President, Development
Goodwill Industry

armandozumaya.com
• The **Nature of Major Gifts**
• Dealing with **Preconceptions** and **Prejudice**
• **The Missing Piece**: Prospect Research
• Board Recruitment **First**
• **Cultural Relevance**
• Creating New Philanthropy- **Mass Giving**
• **Cold Calling & Small Events**
• **Inclusiveness**
What do you believe are the most commonly under-invested areas of fundraising?

- Staffing and Time
- Training
- Other Resources
- Leadership
- Patience
- All of the above!
ABOUT MAJOR GIFTS WORK

• The most **misunderstood** and **despised** part of fundraising

• Commonly **under-invested**
  • Staffing and Time
  • Training
  • Other Resources
  • Leadership patience

• Need to insure **Board and Leadership support** before proceeding
DEALING WITH PRECONCEPTIONS AND PREJUDICE

• “Those people”
• Self-perpetuated as well!
• Self analysis of where you get your information from?
• Know the facts and confront myths
• Study your community and its wealth
  • More private
  • Often hidden
  • Might need to create new philanthropy
THE MISSING PIECE

• Most nonprofits don’t have any Prospect Research function
• Those that do commonly use it poorly
• Very few Prospect Researchers are ever asked to address diversity

• Answer myth with data

• Prospect Research
  • Full time staff for 3 development officers or more
  • Part Time function
  • Freelance PR Consultant

“Give me a list of Latinas who have businesses valued at over $10 million in Los Angeles County who are philanthropic at a $1,000 level on up”
HIRE A FREELANCE PROSPECT RESEARCHER

My website has a list www.armandozumaya.com

Prospect L has 4,000+ researchers. Send a message there!

Check out www.aprahome.org

FRPA on LinkedIn
What does a diverse mass giving prospect see when they look at your Board?

• First piece is your board’s diversity or lack of
• Create strong and unanimous internal agreement on a diversity plan
• Use Prospect Research to identify 7 to 1 list of candidates
• Study what your board needs beyond diversity
• Create staff/board recruitment partnership

Implement plan, track, and adjust
But don’t I need a person of color to approach a person of color?
Understanding another community’s philanthropy:

• Interview known philanthropists and leaders
• Understand your organization’s history (or lack thereof)
• Document and learn from cultural differences around money and giving
• Are there community business leaders?
• What role does the church/religion play?
• How is the role of women and family different?
CREATING NEW MG PHILANTHROPY

It is better if they are already small/annual donors

Why aren’t they philanthropic?

Introducing Philanthropy
• Using social structures
• Present it as part of citizenship
• Present it as leadership
• Identify specific community projects with clear ROI
• PR for the donor!

Because they aren’t asked
MATRICULATION

Do you solicit all communities?
Multi-lingual and multi-cultural?

1. Online, social media
2. Radio
3. Music and TV
4. Stores
5. Festivals and Fairs
• Develop a single “Prospect List” you need introductions to.  
  *Make the list clean: Name(s), Company, Town.*

• Talk to **ANY** Board Member, Past Board Member, Donors, Staff you can sit down with.
  
  “I wonder if I could steal 30 min of your time to review a list of people you might or might not know. I am doing some information gathering”

• Bring **ONE list.** Don’t email, ever.

• Put all the information into **one database.**
Argh ye mateys!!

Example: Let's say you work on helping at-risk youth.

Follow this checklist:
1. Who is supporting that and similar organizations?
2. Where are their donor lists?
3. How do I get contact information for them?
4. Who do I know who knows them? Intros?
5. Any problems with going to see them?
WHEN STUDYING A DONOR LIST

- People with **clear titles.** (CEO, VP, etc.)
- On Boards of Directors:
  - People who **aren’t academics, teachers, ministers,** etc. (nice folks without wealth)
- Google them and find out who they are
- Look for individuals who are on **multiple Boards** whose emphasis is children.
- Look for people who are on children’s Board’s but **ALSO** prestigious high philanthropy Boards:
  - Opera, Universities, major hospitals, etc.

**These boards often have a minimum gift.**
COLD CALLING

Get trained; it’s a **learned skill**

Learn from a **colleague** who knows how

Review Armando’s trainings on cold calling

Develop **specialized approaches** for **diverse groups**

Use large lists for **large-scale prospecting**
SMALL EVENTS

- In-Home hosted dinners
- Identify Host
- Mission Education Focused
- Free and accessible
- Base your MG events on Prospect Research
  - Social structure
  - Business
RESOURCES

• www.google.com
• www.muckety.com
• www.wealthengine.com
• http://home.comcast.net/~lambresearch/index.html
• http://www.opensecrets.org/indivs/index.php
• www.411.com
• www.zabasearch.com
• www.manta.com
CREATING INCLUSIVENESS

• Organizational leaders understand that inclusion means:
  • Everyone’s **voice** is heard
  • Everyone’s **opinions** are considered
  • Everyone’s **value** to the team is **evident**

• Train managers—**and hold them accountable**—to show that inclusivity is a core competency.

• Value differences! Create an environment where people can feel comfortable bringing their “**full selves**” to work.
CREATING INCLUSIVENESS

• Identify underrepresented groups’ needs, and give them necessary support and resources.

• Provide workers with a safe space to voice their concerns.

Remember:

Daily interactions = the most telling sign of an organization’s inclusive culture (or lack thereof)
Questions?

Please send them in the chat!
CONTACT ARMANDO

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More Webinars & Resources from Armando:

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2nd Edition
Cause Selling textbook

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WANT MORE ON PROSPECTING?
Watch our previous webinar:

Becoming a Master Prospector

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Approaching the Prospective Donor: Step 3 of the Cause Selling Cycle

July 17, 2019
11:00am – 12:00pm PST
2:00pm – 3:00pm EST

Register Today!
Thank you
TAKING YOUR CAUSE AND
CREATE IMPACT.