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**SPECIAL REPORT**



Philanthropy  
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# You Gotta Ask!

## Background on Potential Donors Helps; Face Time Brings Mission to Life

By SHERRI CRUZ

Asking for money is part of a nonprofit executive's job.

Before Lisa Wolter approaches a potential donor to "make the ask," she's done her homework.

Wolter, executive director of the Costa Mesa-based Orange County affiliate of **Susan G. Komen for the Cure**, knows a bit about who potential donors are, their line of business, and any connection to her organization's cause.

When Wolter originally asked Harald Herrmann for a donation, she already knew he had an interest in the organization's mission.

"We knew he cared," she said.

Herrmann is chief executive of Irvine-based **Yard House Restaurants USA LLC**.

Herrmann's first wife died of breast cancer. His son took part in Komen's support group for kids, which used to be called Komen's Kids, but has since spun off as Laguna Hills-based Kids Connected.

Wolter made an appointment with Herrmann to meet him on his turf at his Yard House office.

It's important the donor is comfortable. She usually brings another person with her.

"I like to go with one other person so we're able to have a conversation."

Face-to-face meetings are ideal, she said.

"I can write a proposal, send a letter, but if I can get a face-to-face, that's better," she said. "The old adage that people give to people is true."

Her ask was simple: "Do you want to be involved in the Race for the Cure?"

The race is Komen's main fundraiser.

Yard House became a sponsor.

"It took two to three meetings to work out his ideas and our ideas," she said.

Often, she goes in with one idea and comes out with a new one from the donor.

### "A Little Scary"

Asking for money can be uncomfortable. "It's hard," she said. "It's a little scary."

When she's asking for money, Wolter thinks about who she's asking for.

"You always remember that you're asking for your mission work," she said. "It's not about me. It's for implementing something that the donor cares about."

Wolter tries to convey the "win-win"—that it's not just Komen that benefits—the donor benefits, too.

Much of a nonprofit executive's work revolves around the donor—establishing and nurturing relationships as well as explaining the benefits of supporting the organization.

Jerri Rosen, chief executive and founder of Costa Mesa-based **Working Wardrobes**, emphasizes ongoing recognition for donors.

"We offer year-round benefits to our donors," Rosen said. "We introduce them and recognize them in the community."

Working Wardrobes provides work clothing and job placement for those in need.

It invites donors to become part of the organization and to speak at gatherings and fundraising events.

Rosen often hosts donors on her Working Wardrobes cable TV show.

A spot on the show was reserved for Jeffrey Coats, chief executive of Irvine-based **Autobytel Inc.**, which generates



Long haul: Pacific Life Insurance Co. hosted inaugural Race for the Cure in 1992, added anniversary gift this year



Working Wardrobe's Rosen, Autobytel's Shugg: nonprofit reserves spot for auto researcher on cable program

sales leads for dealers and research data to consumers.

Autobytel is one of Working Wardrobes' newer donors.

Coats had been looking for a philanthropic cause that his company could support, Rosen said. Meanwhile, some of Autobytel's employees had been supporting Working Wardrobes as volunteers.

"He was very mindful of the feedback from his employees who knew us," Rosen said.

### Tours

That volunteer connection helped Rosen land a meeting with Autobytel's executives. She met with Coats and Rich Shugg, sales director, and other senior executives.

They took a tour of Working Wardrobes, a good way to show donors how the organization helps people.

Now Autobytel is one of its largest donors, contributing \$25,000 this year.

As a banker, Henry Walker gets asked for money all the time.

"We all want to recognize good causes," said Walker, chief executive of **Farmers & Merchants Bank**, which is based in Long Beach with 12 locations in Orange County. "But there are only so many dollars on an annual basis."

When Ralph Opacic, president and execu-

utive director for Santa Ana-based **Orange County High School of the Arts**, asked him to help "finish off a world-class school," Walker was happy to help.

The key: **Farmers & Merchants** already had a longstanding relationship with the school.

"We were glad when they asked," he said. "It made good sense."

**Farmers & Merchants** put together a \$30 million financing deal for the school's renovation and expansion.

### New Givers

Identifying new donors is an ongoing effort.

A few years back, Komen discovered Aliso Viejo-based **Clarient Inc.**, a company that's now part of **General Electric Co.** and tests tumor tissue to give doctors guidance on treatment.

"We thought, 'Let's see if they want to be a Race sponsor because of their business,'" Wolter said.

Clarient signed on as a sponsor. When Wolter met with Clarient Chief Executive Ron Andrews just to thank him, she found he had a personal reason to care about breast cancer. His grandmother, who helped raise him, had died of breast cancer.

Clarient is now one of Komen's top donors.

Andrews is one of Komen's "Pink Tie Guys," a group of high-profile businessmen who raise awareness for breast cancer.

### Donors as Askers

Many Orange County executives serve on nonprofit boards, so many donors are also askers.

Wayne Pinnell, managing partner of Irvine-based **Haskell & White LLP**, gets a lot of requests for donations.

"Sitting in the seat that I'm in, the requests come from email, mail and sometimes phones calls." The easiest donations to make are the ones that come from peo-

ple he knows, he said.

Pinnell also is an asker.

As a director of Ladera Ranch-based **Laura's House**, a shelter for victims of domestic abuse, he's in charge of raising money to fund the organization's new shelter.

The total cost is \$4.5 million, with roughly \$1 million left to raise.

On a capital campaign, the goal is to go after the big donations first, Pinnell said. That's usually done by tapping colleagues, friends and family first, he said.

Laura's House also enlisted a consultant to help raise money. The consultant helps identify donors and comes up with fundraising events.

"They're sort of the equivalent of the investment banker who helps you raise

money for your business," he said.

Soon, Pinnell will be fundraising for improvements to the **Boys & Girls Club of Santa Ana**, an on-site after school educational program. Pinnell has been on its board for seven years. He became president in July.

### Komen's 20th

Long-lasting relationships between a donor and a nonprofit can be fruitful.

Newport Beach-based **Pacific Life Insurance Co.** has long been the venue for the Race for the Cure.

It hosted the inaugural Race for the Cure in 1992.

This year, Komen asked for an extra gift to recognize the fundraiser's 20th year. It's being held Sept. 25.

Komen officials sat down with the head of the Pacific Life Foundation and asked for \$20,000.

"Happily, they said, 'We'll think about it,'" Wolter said.

A couple of weeks later, Pacific Life Foundation had gathered a bunch of its donors and announced that it was giving its \$20,000 Walter B. Gerken Award to Komen. ■