

AFPICON 2019 SAN ANTONIO, TX MAR 31 - APR 2

STEWARDED DONORS WITH DEMENTIA



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Affiliations

- Robert Hofmann, MA, CFRE, is a Senior Director of Development at the University of Minnesota Duluth (UMD). Today's presentation is a professional independent exercise of the presenters. The University of Minnesota Foundation and UMD have not sanctioned or endorsed the findings of the referenced study nor today's presentation.
- Jolene Hyppa Martin, PhD, CCC-SLP, is a clinical supervisor at UMD and has no financial or nonfinancial relationships related to the content of this presentation.

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Ethics & Dementia

- Professional fundraisers adhere to strict ethical standards
- May wish to continue to steward a respectful, professional relationship with an existing or former donor who is experiencing memory loss, while working with the donor's representatives
- A growing number of our faithful donors are living with Dementia that complicates our relationship with them, their families, care partners, and philanthropy advisors

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Rob's Experience

- Ill equipped to navigate this issue
- Desire to learn more about dementia
- Desire to apply what was learned to donor relationship

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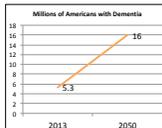
Dementia

- Definition of Dementia
 - A “collection” of symptoms
 - Memory, attention, language, communication, planning, judgment, decision making, problem solving, sensory systems
- Dementia is not Alzheimer's Disease
- Alzheimer's Disease is the most common cause
 - There are several causes
 - Possible to have dementia, but **not** have Alzheimer's

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Dementia

- 1 in 10 65+ year olds have dementia
- Over 5.3 million Americans
 - Expected to double in the next 30 years
- Fastest growing clinical population
- For some professional fundraisers donor population may include many 65+ year olds



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Survey Purpose

1. Do professional fundraisers experience a need or desire to steward relationships with previous donors who now have dementia? (Leukuma & Hyppa-Martin, 2018)

2. Do professional fundraisers feel adequately prepared to communicate and interact with persons who have dementia? (Leukuma & Hyppa-Martin, 2018)

» **If there is a need for additional preparation, what are preferences for content and delivery format?** (Leukuma & Hyppa-Martin, 2018; Olson & Hyppa-Martin, 2017.)

This survey was conducted using methods approved by the LM Institutional Review Board. Leukuma & Hyppa-Martin, 2018, refers to Bridget Leukuma's master's thesis (in preparation). Olson & Hyppa-Martin, 2017, refers to Christine Olson's undergraduate research opportunity project (an unpublished poster presentation at UMDO). The researchers acknowledge Rob Holman, MA, CFE, for inspiring this research project and advising on survey content and terminology.

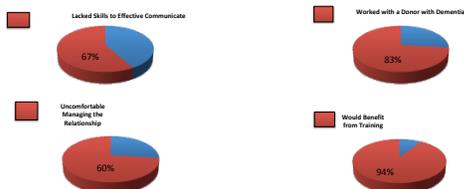
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Survey of Professional Fundraisers

- **94% currently employed as professional fundraiser**
 - 1% diploma/GED; 35% college degree; 48% master's degree; 10% doctoral degree
 - 53% specialized certifications
 - 45 US states represented
 - 64% had 11-20+ years experience as PF
- **2% eldercare; 9% religious; 18% social/community service; 14% healthcare; 47% higher education**
- **48% considered a "major gift" to be \$25,000 or more**
 - 76% had managed 50-500+ major gift donor relationships
 - 55% report that at least 50% of their major gift donors are 65+ years of age
- **97% confident in describing the difference between dementia and related conditions**
 - Nearly 1/3 did not select correct definition of dementia

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n=419 Professional Fundraisers



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Rob's Experience

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Keys to Better Communication

- | | |
|--|---|
| 1. Manage the environment
– Distractions, lighting, noise, smell | 6. Validate the underlying feeling or intent
– "Your family has always been important to you." |
| 2. Orient and introduce
– Other and repeat key information | 7. Help by providing a starter phrase
– "You really liked the garden..." or "Your visit to Yale..." |
| 3. Reduce pronouns
– Use nouns | 8. Ask choice questions
– "Would you like coffee or tea?" |
| 4. Provide non-transient cues
– Hand signs, color-coded papers, pictures | 9. Keep your non-verbals positive
– Control physical attractiveness, not invasion |
| 5. Reminiscence about the distant past
– Getting up in the back seat for week's 4 (March 1981) | 10. Dignity and respect
– Do not use and highlight either sex's weakness, unique, important. Support them in maximizing socially-related roles. |

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Keys to Better Communication

- **Manage the environment**
 - Means that we need to take the responsibility to proactively to:
 - Reduce distractions
 - Ensure adequate lighting
 - Be at their physical level

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Keys to Better Communication

• **Orient and Introduce**

- Don't assume that an individual will remember you.
- Introduce yourself and others.
- Introduce topic.
- Offer and repeat key information.

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Keys to Better Communication

• **Reduce pronouns**

- Use nouns.
- Pronouns tax memory.
- "Susan Long sends her regards. Susan is meeting with architects today."
 - Is better than: "Susan sends her regards, she's meeting with the architects today."

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Keys to Better Communication

• **Provide non-transient cues**

- Non-transient cues can aid speech comprehension
- Examples:
 - Name tag with name and affiliation
 - Brochure with photo of the art museum
 - Conversation pieces

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Keys to Better Communication

- **Reminisce about the distant past**
 - When you want to talk about the past, reminisce about the *distant* past.
 - Avoid: “What did you buy when you were shopping on Monday?”
 - Instead, reminisce about the distant past... “Bob, you grew up in the Mankato area right? Did you enjoy fishing on the rivers in the Mankato area?”

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Keys to Better Communication

- **Validate the underlying feeling or intent**
 - No need to correct.
 - Think of the underlying intent.
 - Then follow it up with a redirection into a productive conversation.

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Keys to Better Communication

- **Help by providing a starter phrase**
 - We all occasionally “lose our train of thought.”
 - Casually and naturally rephrasing where they left off.
 - For example, if Bob begins telling you about a visit to Vail and then stops, you might say, “Your visit to Vail...” then pause.

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Keys to Better Communication

- **Ask choice questions**
 - Open-ended questions require the listener to remember/recall the names of possible options.

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Keys to Better Communication

- **Keep your non-verbals positive**
 - Stay relaxed, positive and attentive in your facial expressions and body language.
 - Don't Yell. Speak in a clear voice, at a normal pace.
 - Slowing way down and talking much louder does not help the exchange.

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Keys to Better Communication

- **Let dignity and respect be your guide**
 - Support them in maintaining socially-valued roles.
 - It can be important that they know that their wishes and well-laid plans are being honored.

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Turning “Keys” into Action Steps

<ol style="list-style-type: none"> 1. Manage the environment <small>– Use pillows, lighting, fans, heat</small> 2. Orient and introduce <small>– Offer and repeat key information</small> 3. Reduce pronouns <small>– Use nouns</small> 4. Provide non-transient cues <small>– Repeat tags, conversations, pointing pictures</small> 5. Reminisce about the distant past <small>– Drawing up on the face, not the week’s shopping list</small> 	<ol style="list-style-type: none"> 6. Validate the underlying feeling or intent <small>– “Your anger has always been important to you.”</small> 7. Help by providing a starter phrase <small>– “You really liked this...” or “Your visit to Val...”</small> 8. Ask choice questions <small>– “Would you like coffee or tea?”</small> 9. Keep your non-verbals positive <small>– Gentle pleasant affirmations, not sarcasm</small> 10. Dignity and respect <small>– The person and his/her wishes are worthy, unique, important. Support them in maintaining socially valued roles.</small>
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Ethics & Dementia

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Selected Resources

- Alzheimer’s Association: www.alz.org
- The American Speech-Language-Hearing Association, *What Can I Do to Communicate Better with a Person with Dementia?*: <http://www.asha.org/public/speech/disorders/dementia/>
- The American Speech-Language-Hearing Association, *What is Dementia?*: <http://www.asha.org/public/speech/disorders/dementia/>
- National Institute on Aging, *Alzheimer’s Dementia*: <http://www.nia.nih.gov/alzheimers/publication/alzheimers-disease-fact-sheet>

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Questions & Answers

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