



10 Moves that Unlock Major Gifts:

From Research To Real-
World Practice

Story

- We'll get to the data (because that's what I do)
- But we're going to start with story (because that's what works)





What is Story?

Story Elements: Setting, backstory, call to adventure, climax, and resolution

What is Story?

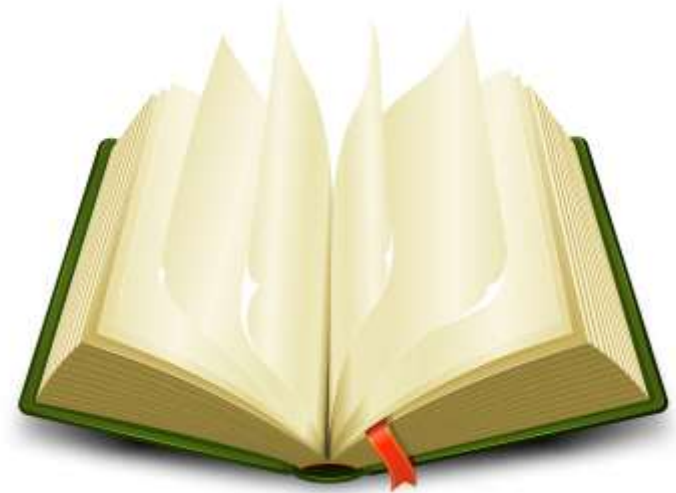
Story Elements: Setting, backstory, call to adventure, climax, and resolution. Or,

Original Identity (backstory and setting) →

Challenge (call to adventure) →

Victory (climax) →

Enhanced Identity (resolution)



Challenge
↗ ↘
Identity ← Victory

Because this is *BIG* gift fundraising, we're going to talk about the DONOR'S story.

(If this were *small* gift fundraising, we could talk about the charity's story.)

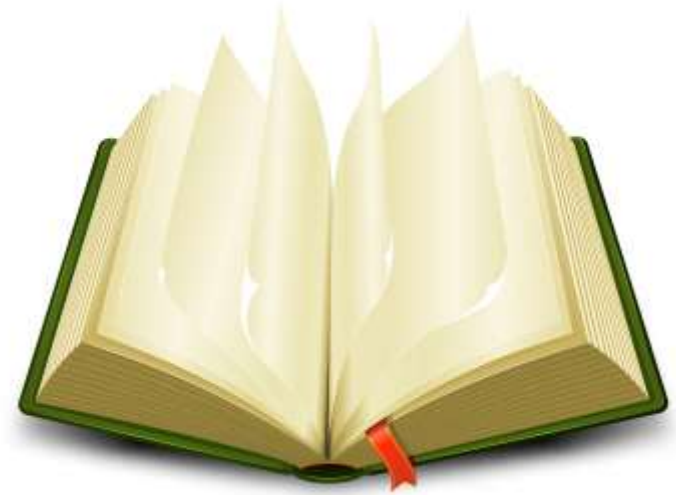
Story Elements:

Original Identity (backstory and setting) →

Challenge (call to adventure) →

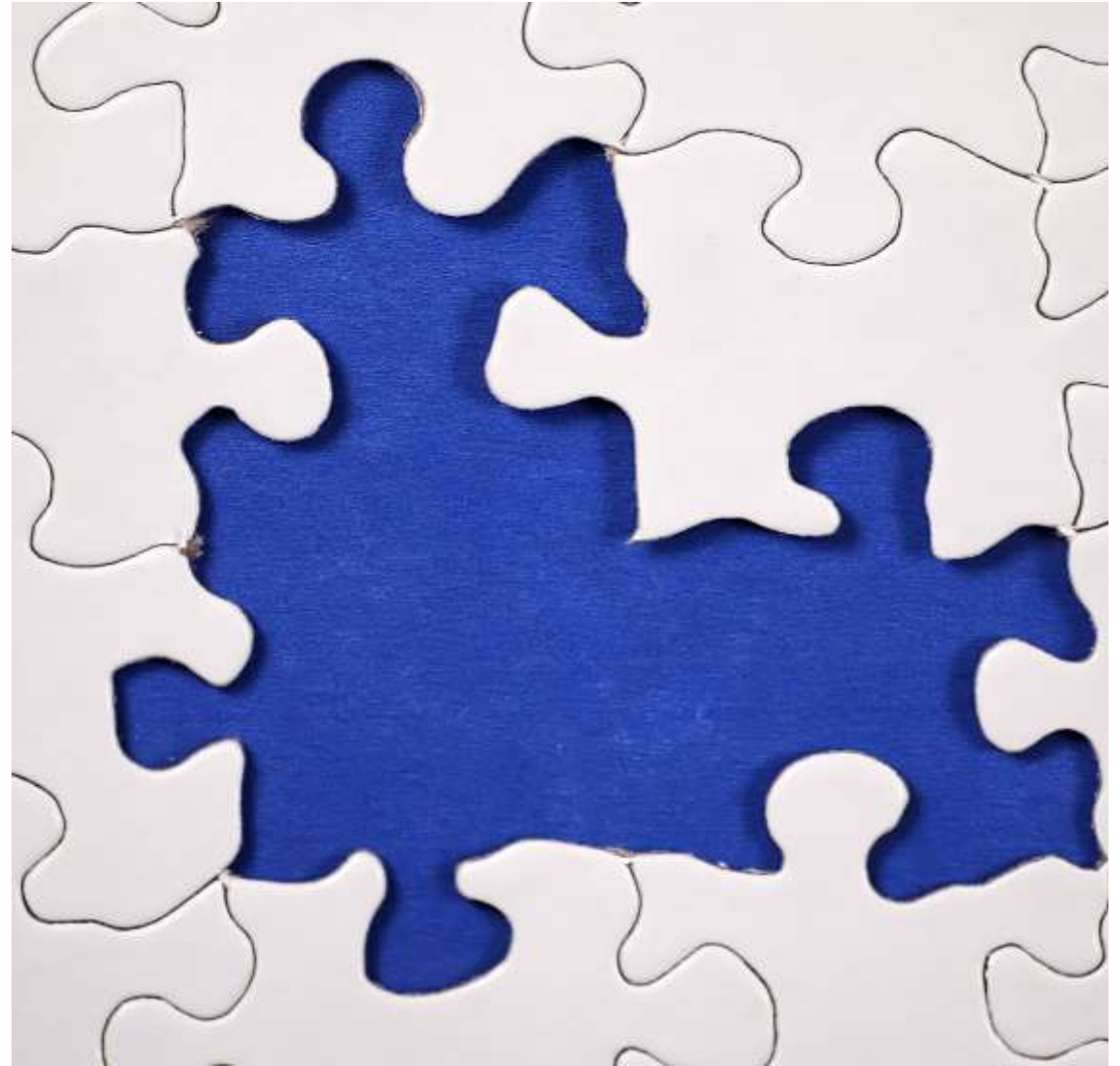
Victory (climax) →

Enhanced Identity (resolution)



When fundraising fails,
it's usually because it's
missing one of the
three story elements

Challenge
↗ ↘
Identity ← Victory



The hero's journey, the donor's story, and the fundraiser



- **CHALLENGE** [*Call to Adventure*]. A guiding sage challenges: Leave behind your ordinary (small, self-focused) world and go on a heroic (costly or risky) journey to impact the larger world.
- **IDENTITY** [from *Backstory/Setting*]. The call is refused but the guiding sage persists: “You must accept the call because of who you are (identity).” The call is accepted.
- **VICTORY** [*Climax*]. With the help of the guiding sage (providing magical instruments of impact, friends, and allies), the hero ultimately accomplishes the victory.
- **ENHANCED IDENTITY** [*Resolution*]. The hero returns to a place of beginning with a gift to improve that original world as a transformed (honored) victor.

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CTA: Save the rebellion and the princess. “You must learn the ways of the Force if you’re to come with me to Alderaan... I need your help, Luke. She needs your help.”
Identity (people): The rebellion fights against Darth Vader who “betrayed and murdered your father”
Identity (values): The light side of The Force



CTA: Take the red pill, be freed, and enter the real world.
Identity (life story): “You’ve felt it your whole life, felt that something is wrong with the world.”
 “You are a slave, Neo. Like everyone else, you were born into bondage... a prison for your mind.”



CTA: Go on a journey to save the shire.
Identity (life story): “I remember... a young Hobbit who would have liked nothing better than to find out what was beyond the borders of the Shire.”
Identity (people): “Your great-great-great-uncle Bullroarer Took ... In the Battle of Green Fields, he charged the Goblin ranks ... he knocked the Goblin king's head clean off”

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- "Now Moses was pasturing the flock of his father-in-law Jethro," (Exodus 3:1a). "And now come, and I will send you to Pharaoh, so that you may bring My people, the sons of Israel, out of Egypt." (Exodus 3:10).
 - Moses refuses God's call to adventure three times. (Exodus 3:11; 4:10, 13). God persists.
 - Identity (people). Serve as God's instrument like your ancestors. "I am the God of your father—the God of Abraham, the God of Isaac, and the God of Jacob ... Assuredly I will be with you," (Exodus 3:6, 12b).
 - Identity (Creator). "'I am slow of speech and slow of tongue.' But the LORD said to him, 'Who has made the human mouth? ... Is it not I, the LORD? Now then go, and I Myself will be with your mouth, and instruct you in what you are to say.'" (Exodus 4:10b-11a, 11c-12).
 - A staff that turns into a snake and back to a staff. (Exodus 4:2-4); A hand that becomes leprous and returns to normal. (Exodus 4:6-7); The ability to turn Nile river water into blood. (Exodus 4:9).
 - Returns to Egypt and then Horeb/Sinai to free and then reconnect his people to God as the leader of Israel

Be the guiding sage
who challenges with
a heroic choice!

IDENTITY: Start with the
donor's philanthropic
identity

CHALLENGE: Deliver the
heroic challenge

VICTORY: Help the donor
experience a heroic victory

IDENTITY: Confirm their
resulting positive identity



Challenge



Identity ← Victory

10 Moves That Unlock Major Gifts

IDENTITY: Start with the donor's philanthropic identity

1. Find your people group: The wealth holders
2. Find their donor joy: Help them define a personally meaningful victory from their identity (personal values, life history, and social/family norms)

CHALLENGE: Deliver the heroic challenge

3. Talk wealth not income: Discuss the donor's past, present, and future asset story
4. Don't beg or bully: Walk alongside as a persistently helpful philanthropic wealth advisor
5. Make it feasible: Show their financial abundance to accept the heroic challenge

VICTORY: Help the donor experience a heroic victory

6. Deliver donor joy: Focus on the donor's impact, not the charity's
7. Deliver donor joy: Help them build a portfolio of visible results reflecting their identity
8. Deliver donor joy: Build a mutually supportive community for donors
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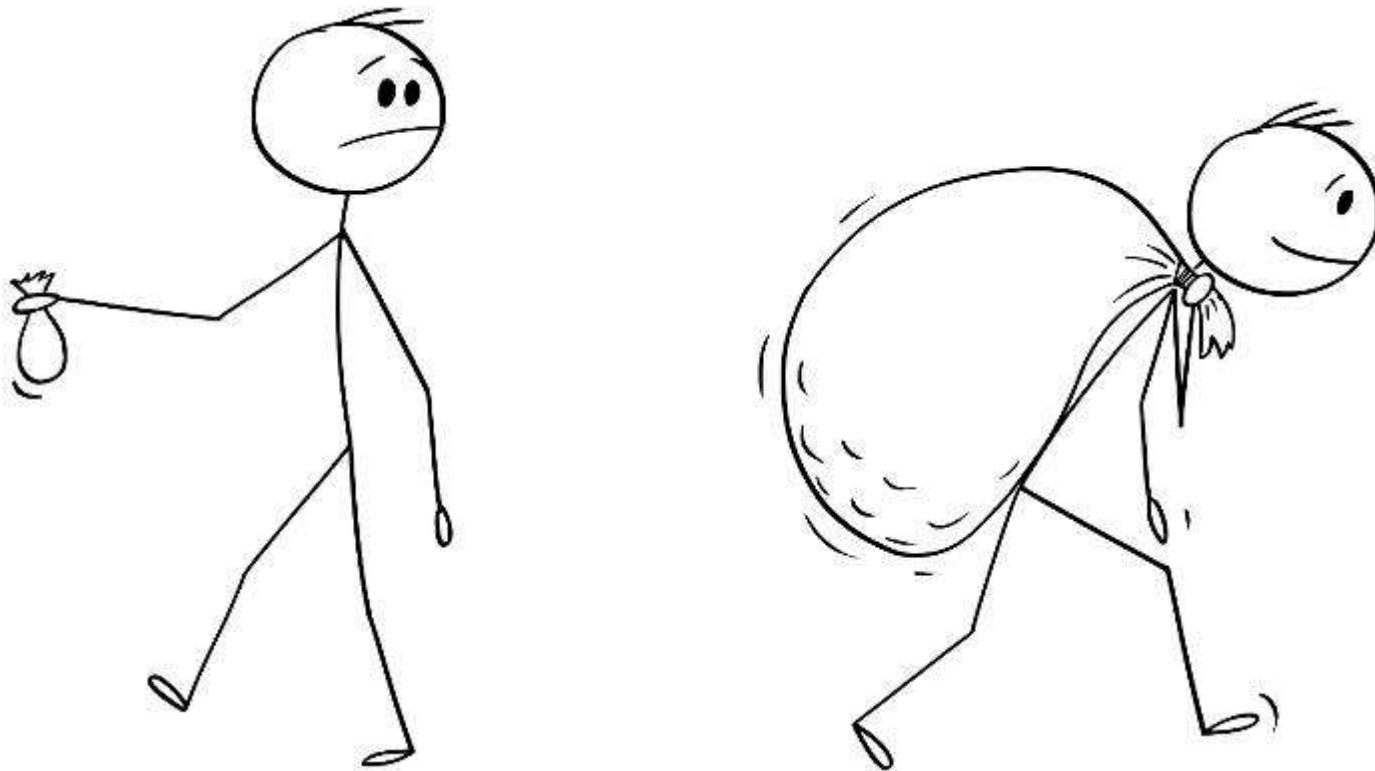
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Basic realities for fundraising



Fundraising is more 80/20 than 80/20.

Data from 38,000 nonprofits (all fundraising software platforms) shows:

- 97.3% of donors give \$5,000 or less. They provide less than a quarter of the money.
- 0.3% of current donors provide half the money
- Most charitable estate dollars in the U.S. come from 0.1% of decedents.

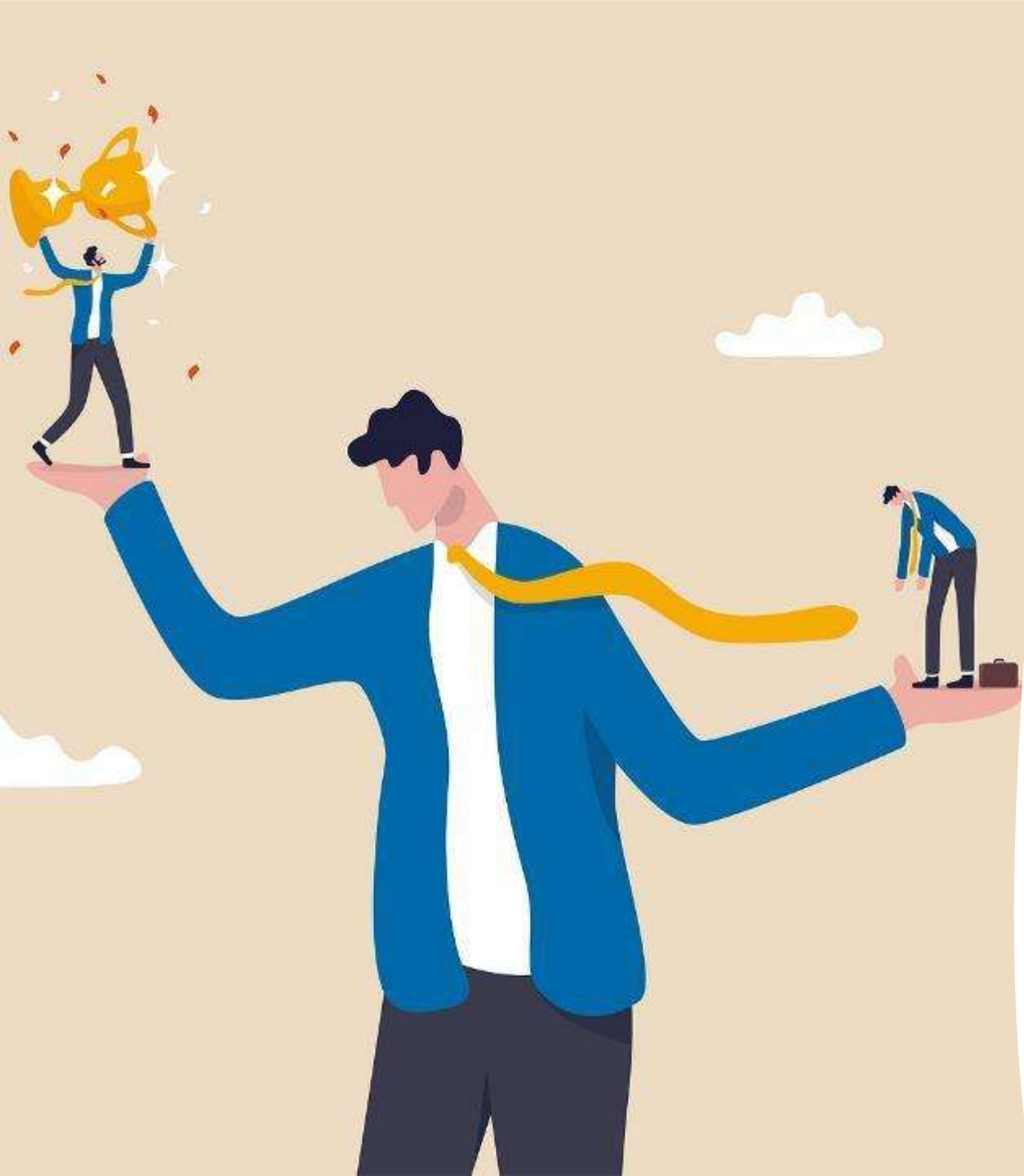
1. Fundraising Effectiveness Project using data from 38,000 fundraising charities; 2. James III, R. N. (2020). American charitable bequest transfers across the centuries: Empirical findings and implications for policy and practice. *Estate Planning & Community Property Law J.*, 12, 235-285, 250.



Fundraising math

Scenario 1. You spend the next two years working with 100 donors. Each has capacity to make a \$10,000 gift. Interest in giving is high. Each has a 75% chance of making that gift. → **\$750,000**

Scenario 2. You spend the next two years working with 100 donors. Each has capacity to make a \$1 million gift. Interest in giving is low. Each has a 3% chance of making that gift. → **\$3,000,000**



Fundraising math v. Fundraising emotion

Suppose you make one gift proposal per week.

Scenario 1. You constantly win. Three out of four weeks, you bring back a big gift! → **\$750,000**

Scenario 2. You constantly lose. On average you'll lose 33 times for every victory. You'll have all of your proposals rejected for over 8 months. → **\$3,000,000**



Sports math v. Sports emotion

- Before analytics, coaches and players did what “felt” good. They avoided the negative emotions of any negative outcome (i.e., “loss aversion.”)
- Analytics led to higher risk, higher reward tactics in basketball (three-point shots), baseball (trade strikes for home runs), and NFL football (passing over running).

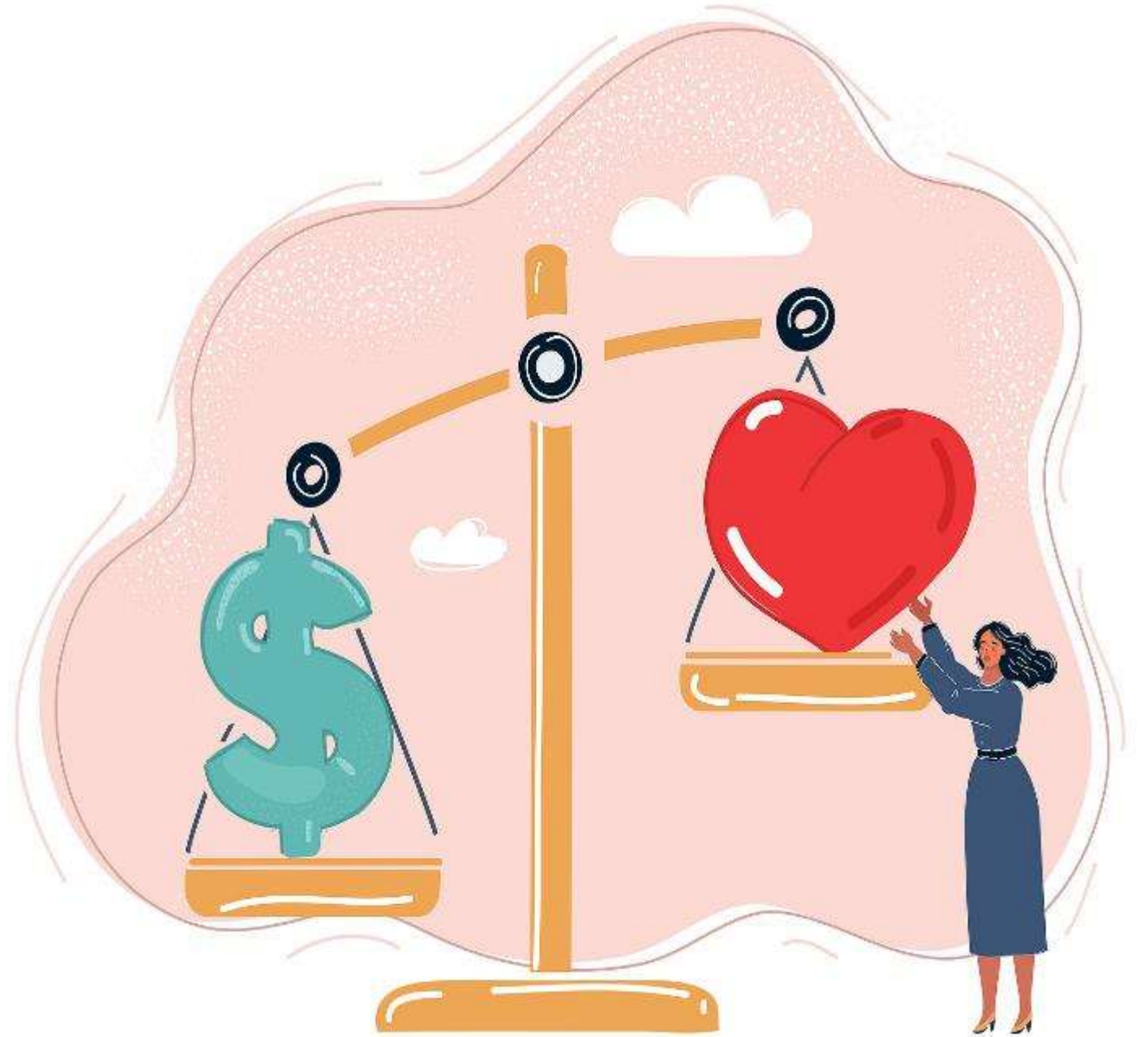
Analytics v. emotions



- In both sports and fundraising, the emotions don't match the math
- Focusing on winning a larger share of plays (or asks) feels better
- Focusing on winning the biggest plays (or asks) actually works better

Major donor math

- We want donors with high interest **and** high capacity, but these are not equally important
- We **can** influence a donor's interest (through experiences, relationships, values connections), but we **can't** change their capacity



The right behavior: Spending time with high-capacity donors

The right behavior isn't the easy behavior. As James Daniel writes, "Many would gladly trade cold million-dollar prospects for warm ten-thousand-dollar prospects. Unfortunately, many do make this swap – a recipe for failure."





The prospect prescription

The right metrics should nudge the right behavior: spending time with high-capacity donors. E.g., capacity minimums for portfolios; multiplying activity metrics by capacity rating; more flexibility with high-capacity success rates and timetables.

What if we don't have enough high-capacity donors?

John Greenhoe relates, “the most successful development officers I have worked with developed a regimented procedure for connecting with new prospects.”

Referrals can work, too. “Who do you know that may be interested in our work?”

Start here: “How can we provide value to high-capacity prospects?” Ex: attractive experiences, recognition, gift planning expertise, access to a valuable social network.



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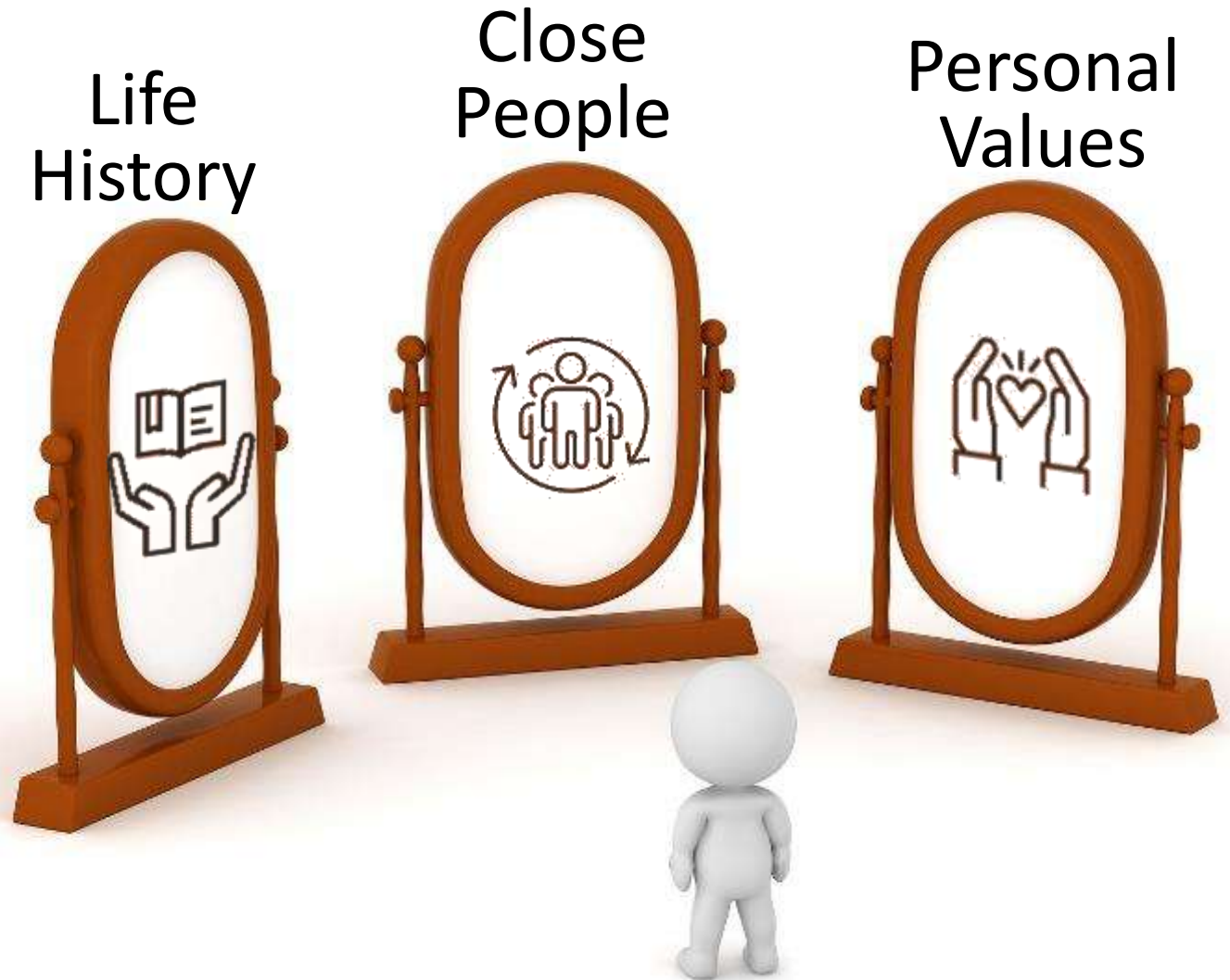
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Identity

Examples of opening questions to connect the donor's identity

(life history, close people, personal values)

with the charity, the cause, or philanthropy



“What inspires you to give?”

Cadogan, E. & Skinner, K. (October 2016). Transformational blended gifts: Shifting the organizational culture. National Conference on Philanthropic Planning, Dallas, TX, p. 9



“How does your giving reflect your values, your feelings, and your aspirations?”

Ahern, T., & Joyaux, S. P. (2011). Keep your donors: The guide to better communications & stronger relationships. John Wiley & Sons. p. 147

“What do you think are the most important factors to donors who make a major gift to our institution?”

Personal Values

Muir, R. (November 17, 2015). 21 discovery questions to ask now. [blog]. <https://trust.guidestar.org/blog/2015/11/17/21-discovery-questions-to-ask-now/>

“Would you mind telling me about the causes that are most important to you?”

Melvin, A. (2018, October). The ties that bind: Effective cultivation techniques. [Paper presentation]. Charitable Gift Planning Conference. Las Vegas, NV. p. 5

“How has [this cause or organization] been important in your life?”

See James, R. N., III. (2016). Phrasing the charitable bequest inquiry. *VOLUNTAS: International Journal of Voluntary and Nonprofit Organizations*, 27(2), 998-1011.

Challenge

Identity ← Victory

“How did you learn to be generous?”

Stroman, M. K. (2014). *Asking about asking: Mastering the art of conversational fundraising* (2nd ed.). CharityChannel Press. p. 148

Life History

Vidmar, T. (May 1, 2020). Personal communication. Tony Vidmar, VP University Advancement and Public Affairs, Midwestern State University.

“How did you decide to first start supporting [the organization]?”

“Tell me about your journey since you [graduated / were first diagnosed / joined this cause].”

Comfort, J. & Lumpkin, S. (October, 2017). How to Have the MOST Productive Conversations: From Here to Eternity... [Paper presentation]. National Conference on Philanthropic Planning, Baltimore, MD. p. 6.

“When you were young, was there anyone whom you considered a role model for giving?”

“Can you tell me a bit more about who taught you to be generous or where your generous spirit comes from?”

Steenhuysen, J. (October 2012). Philanthropy planning: What to say and do in the room with your donors/clients to explore and document their philanthropy mission. [National Conference on Philanthropic Planning, New Orleans, LA. p. 7.



Green, F., Wagg, H. & Field, C. (2019). You can't take it with you: The art and science of legacy fundraising. Independently published. p. 106

Eskin, J. (2019). 10 Simple Fundraising Lessons: A common sense guide to overcoming your fear of asking for gifts. Eskin Fundraising Training, LLC. p. 39

“Is there anyone in your family who also cared about [this cause]?”

Close People

“Who are your philanthropic role models?”



Defining a Personally Meaningful Victory

Examples of opening questions and phrases to define a meaningful victory

“What would you like to accomplish with your money that would be meaningful to you?”

Advancement Resources.
(November 15, 2017). The power of the pause: Using silence in donor conversations, [Web page]
<https://advancementresources.org/the-power-of-the-pause-using-silence-in-donor-conversations/>



“If you could do anything for [this organization or cause], if the sky was the limit, what would that look like to you?”

O’Neil, K. (May 6, 2020). Personal communication. Kim O’Neil Associate Vice President, Institutional Advancement, Texas Tech University.

“As you look out to the future, what is the legacy you would like to leave?”

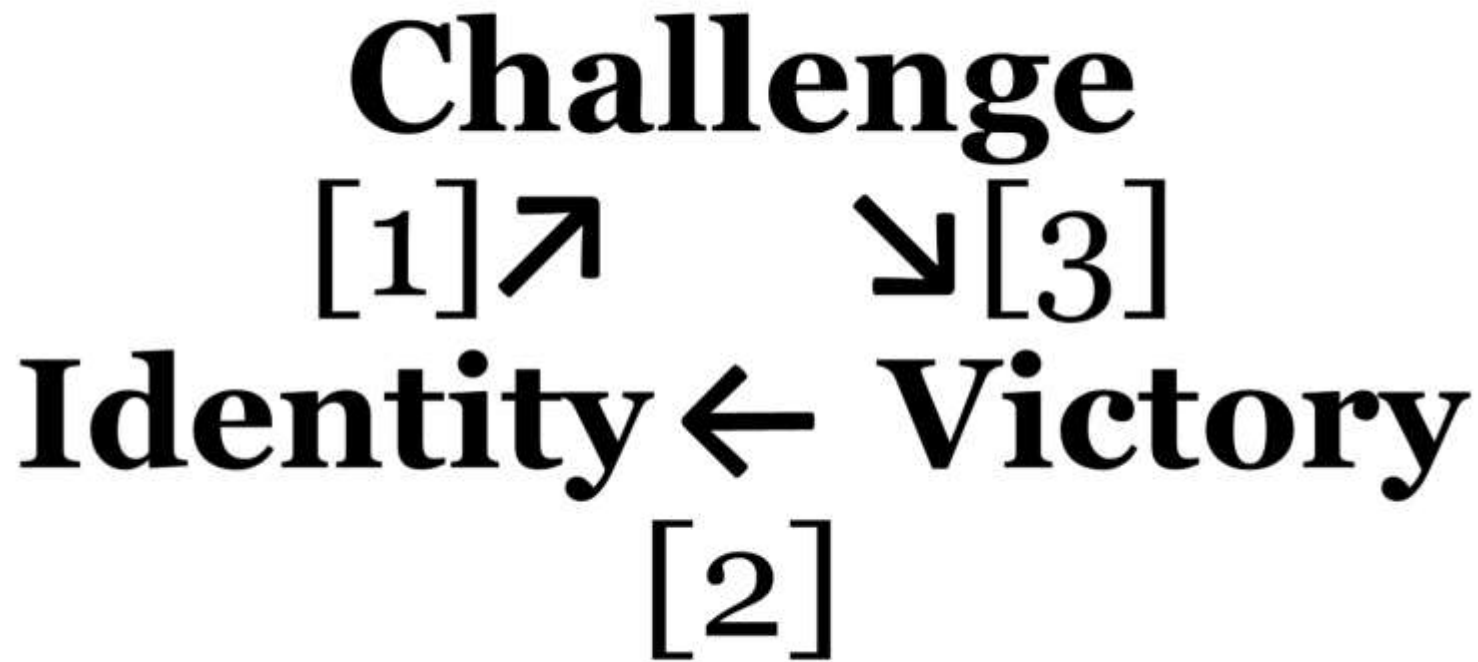
Defining a personally meaningful victory

Comfort, J. & Lumpkin, S. (October 2017). How to Have the MOST Productive Conversations: From Here to Eternity... [Paper presentation]. National Conference on Philanthropic Planning, Baltimore, MD, p. 6.

“You’ve been such a loyal member of the ABC Charity family, and have supported ABC Charity’s mission for so many years, what are your dreams for where you’d like to see ABC Charity go in the future?”

Levine, J. & Selik, L. A. (2016). Compelling conversations for fundraisers: Talk your way to success with donors and funders. Chimayo Press, p. 76

Conversation destination: The story cycle ask



[1] Identity → Challenge
“You have *[describe identity connection]*.”

[2] Victory → Identity
“You understand *[describe how the victory is personally meaningful]*.”

[3] Challenge → Victory
“Would you consider a gift of \$_____ to *[describe promised victory]*?”

Then, be silent.

[1] “You have been a friend of this library for over twenty years.”

[2] “You understand how a new regional history collection would preserve our shared heritage.”

Challenge
[1] ↗ ↘ [3]
Identity ← **Victory**
[2]

[3] “Would you consider a gift of \$50,000 to lead the campaign to make this a reality?”

The story cycle ask

[4] *Be silent*

[1] “You have done so much to improve care for others since your own diagnosis with breast cancer.”

[2] “You understand how lives could be changed by offering free early screening.”

Challenge

[1] ↗

↘ [3]

Identity ← Victory

[2]

The story cycle ask

[3] “Would you consider a gift of \$100,000 to help fund next year’s screening clinics?”

[4] *Be silent*

[1] “You have always had such a heart for supporting the arts in this community.”

[2] “You understand how this new exhibition could make a real impact for art lovers and the whole city.”

Challenge
[1] ↗ ↘ [3]
Identity ← **Victory**
[2]

The story cycle ask

[3] “Would you consider a gift of \$50,000 as our lead campaign donor to make this happen?”

[4] *Be silent*

[1] “You have been such a loyal alumnus of this department since you graduated years ago.”

[2] “You understand how important scholarships are in giving students the chance for an education.”

Challenge
[1] ↗ ↘ [3]
Identity ← **Victory**
[2]

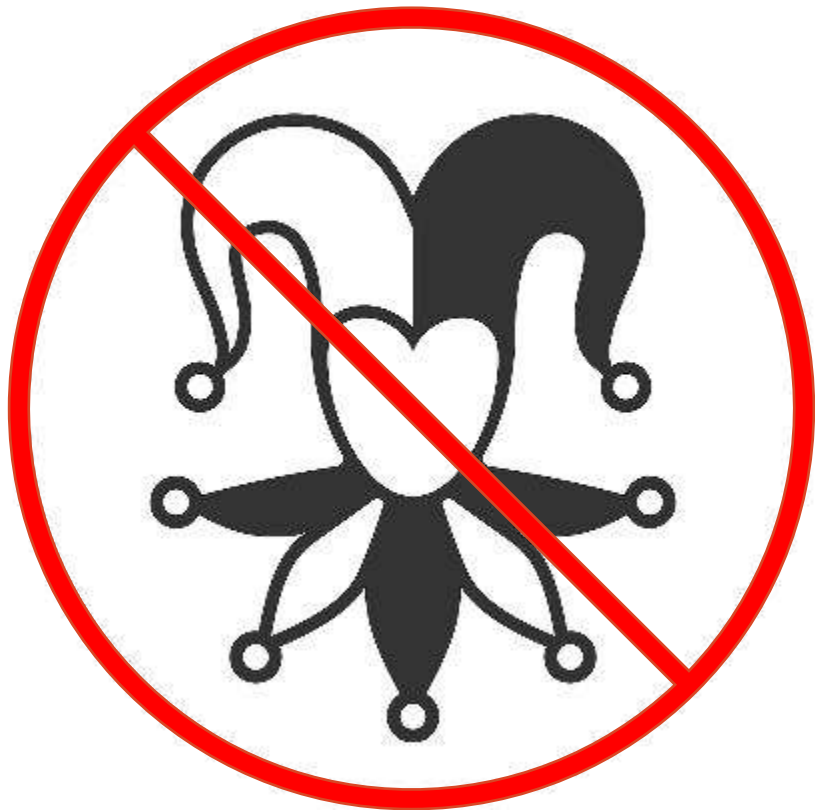
[3] “Would you consider a gift of \$100,000 to fund a permanent named scholarship to help others like you become proud alums in the future?”

The story cycle ask

[4] *Be silent*

Foolproof

Challenge
[1] ↗ ↘ [3]
Identity ← Victory
[2]



You can't make the story cycle ask without the full story

- Don't know how the donor's story or values connect to the challenge?
Step 1 can't happen
- Ask doesn't promise a specific impact?
Step 3 can't happen
- Don't know why the gift's impact would be meaningful for the donor?
Step 2 is impossible

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Wealth is not
income!
Income is not
wealth!

You can have high income and build no wealth.
(Famous celebrities and athletes often go bankrupt.)

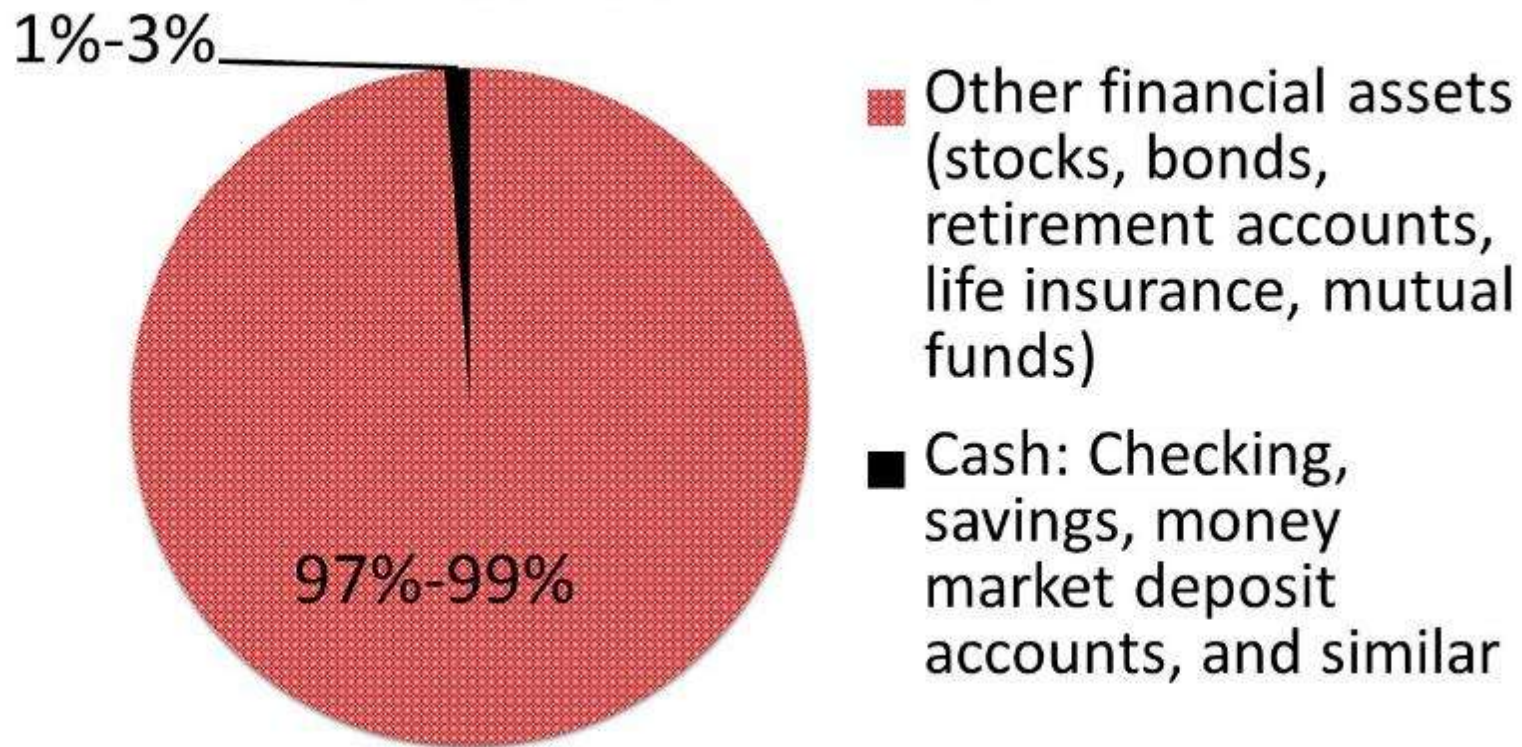
You can have high wealth and little income.
(The wealthy often buy low and sell never.)

Wealth is held in assets, not cash. Wealth
doesn't come from a paycheck. Wealth comes
from owning assets that go up in value.

Wealth is a different money category

Financial assets held by families (U.S. Census 2017)

<https://www2.census.gov/programs-surveys/demo/tables/wealth/2013/wealth-asset-ownership/wealth-tables-2013.xlsx>



- The story of wealth is the story of appreciated assets
- Less than 3% of household wealth is held in cash or checking accounts



Gift size is
relative to the
money category

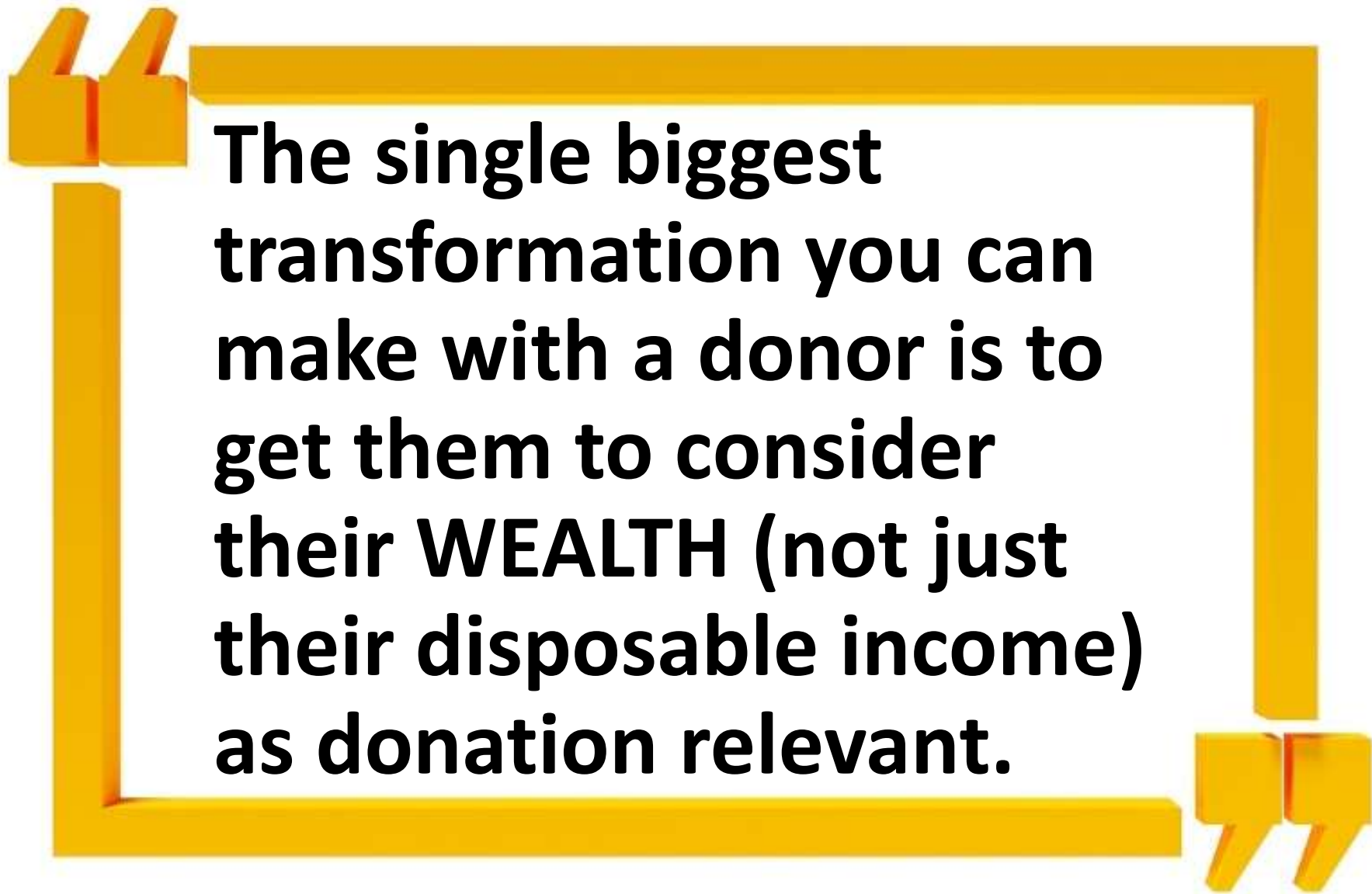
- Asking for cash is asking from the small bucket
- Asking for appreciated assets is asking from the big bucket
- Large gifts are made possible by large reference points

“Mental accounting”

- In math, a dollar is a dollar
- In story, people put labels on money/asset categories and treat them differently based on those labels
- When a new category becomes donation relevant, giving increases



Thaler, R. (1985). Mental accounting and consumer choice. *Marketing Science*, 4(3), 199–214; LaBarge, M. C., & Stinson, J. L. (2014). The role of mental budgeting in philanthropic decision-making. *Nonprofit and Voluntary Sector Quarterly*, 43(6), 993–1013.



The single biggest transformation you can make with a donor is to get them to consider their WEALTH (not just their disposable income) as donation relevant.

5-year growth in **total** fundraising

NONPROFITS
receiving
ONLY
CASH
gifts

2,548 nonprofits raising \$1MM+
in 2010 reported only cash gifts
in 2010 & 2015 on e-file IRS-990

GROWTH

Typical
disposable
income gifts

Gifts of
wealth

NONPROFITS
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SECURITIES
NONCASH
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GROWTH

5-year growth in **total** fundraising

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11%
GROWTH

Typical
disposable
income gifts

Gifts of
wealth

NONPROFITS
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SECURITIES
NONCASH
gifts

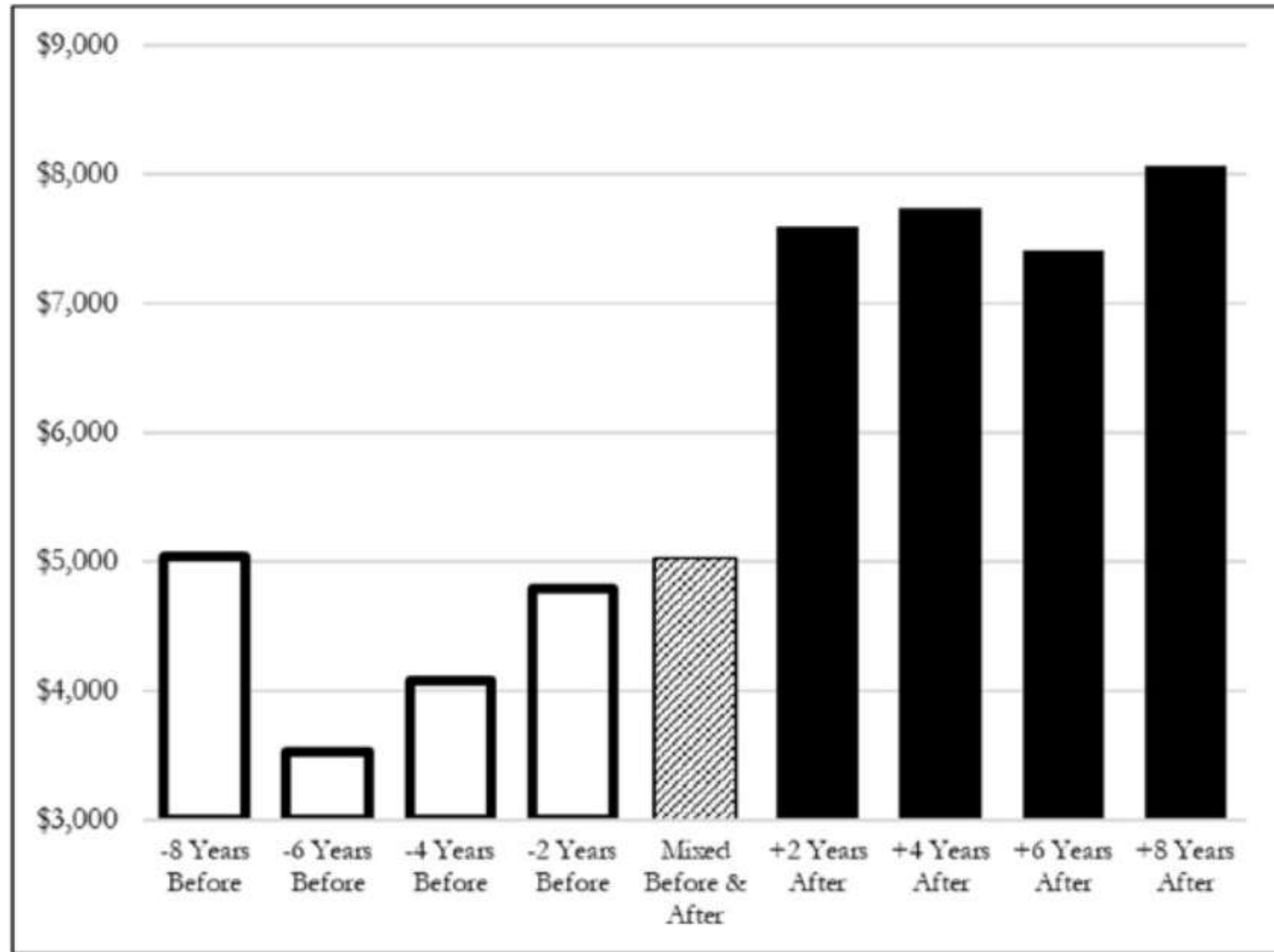
2,143 nonprofits raising \$1MM+
in 2010 reported securities gifts in
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66%
GROWTH

The first time most people ever commit to a gift from their wealth (not income) is in their estate plan

- Estate planning is wealth planning (not disposable income planning)
- It often forces people to confront that they have “extra.” They aren’t going to spend it on normal living expenses.

Figure 1. Average Annual Charitable Donations Before and After Adding Charity to an Estate Plan



James, R. N. III. (2020). The emerging potential of longitudinal empirical research in estate planning: Examples from charitable bequests. *UC Davis Law Review*, 53, 2397-2431 at p. 2422.

The will plan as a gateway to major gifts of assets

Among 18,078 supporters (humanitarian charity) responding to the survey

Most supporters (80%) say they are “unlikely” to make a gift in a will to support the org.

0.4%

Have made a “gift of assets (i.e., stock, real estate, retirement/bank account or life insurance)”

2.2%

Would consider doing so

2.6%

Total openness to asset gifting

Just under 2% of supporters have already included a gift in their will.

21.2%

Have made a “gift of assets (i.e., stock, real estate, retirement/bank account or life insurance)”

15.6%

Would consider doing so

36.8%

Total openness to asset gifting

14X greater
openness to
asset gifting

The right destination: Share valuable options at the NEXT meeting

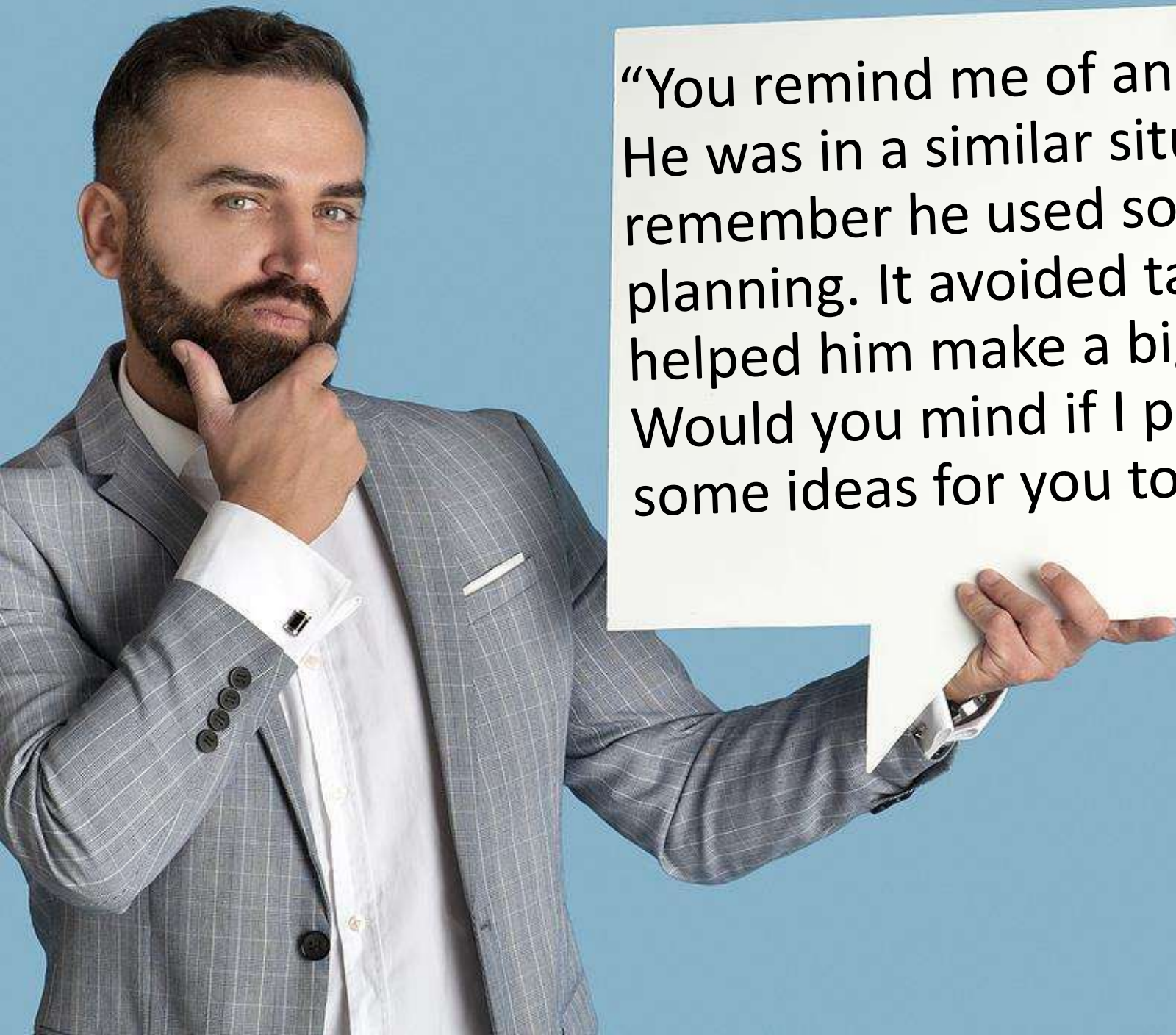
Fundraisers may fear
financial conversations

- These worries can come from having the wrong destination in mind

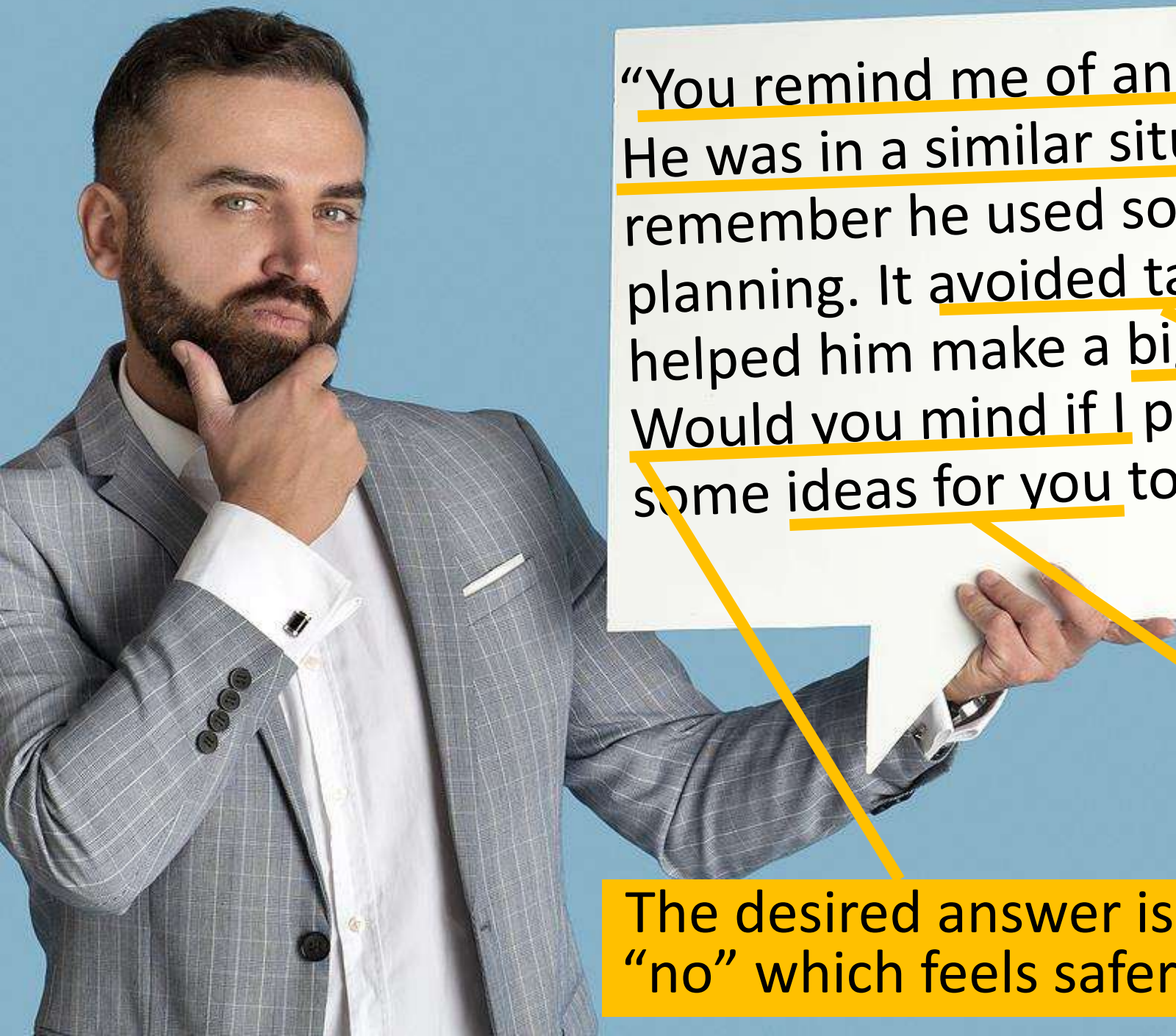
The goal is NOT to quickly
give the right answer

- The goal is to get permission to share valuable options at the next meeting





“You remind me of another donor. He was in a similar situation. I remember he used some creative planning. It avoided taxes and helped him make a big impact. Would you mind if I put together some ideas for you to look at?”



"You remind me of another donor.
He was in a similar situation. I
remember he used some creative
planning. It avoided taxes and
helped him make a big impact.
Would you mind if I put together
some ideas for you to look at?"

People like
the donor
have done
things like
this before

Leads
with
value

Asks for
permission
to share
more value

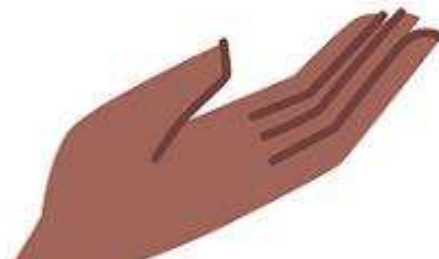
The desired answer is
"no" which feels safer

Having the right
destination
changes things

It gives time to
consult experts
and build
solutions



“I want to talk
with our technical experts
first, so you’ll be sure get all
the best options. But I know
others in your situation have
been able to use some
smart solutions here.”



Start social then follow up

“How’s business?”

“How’s the market been treating you?”

- The magic comes from the follow-up questions
- These show shared interests and reveal opportunities to provide advice





Tell me a story: Past, present, and future

Assets have stories

- Past: Origins of the asset
- Present: What's happening now
- Future: Future plans for the asset

Uncovering this story → Charitable planning opportunities in future plans

Questions can lead the donor through their asset story

Past

- “What’s the story of your business? How did you get started?”

Present

- “What are you proudest of?”
- “What are you most excited about at the current time?”





Future sale or transfer

- “What are your future plans for your business?”
 - “What will that mean to you?”
- “Have you thought about using the sale or transition of your business as an opportunity to achieve some of your charitable goals in addition to financial goals?”

Future estate transfer?

- “Will your heirs continue running the business?”
- “I know there are some smart ways to avoid taxes for people like you who want to include a gift to charity in their plans. Have you ever considered that?”



Other assets?



- “Are you a collector (art, stamps, coins, etc.)?” “What is the story? How did you get started?”
- “Do you invest in Real Estate?” “How did you get started?”
- “Where do you vacation?” “Do you own a home there?”
- “How has the market been treating you?” “What is your investment philosophy?” “What’s the best investment you ever made? Tell me that story.”



Past to present to CHARITABLE future

“Have you considered making gifts with assets instead of cash?”

“Many donors giving at your level use appreciated assets instead of cash because they get a double tax benefit. Have you ever considered giving in that way?”

“How?” questions

“Why?” questions uncover connections to the donor’s people, values, and history

“How?” questions uncover wealth:

- *“You’ve done so much for [charity]. What allows you to be so generous?”*
- *“How were you able to make this wonderful gift?”**



*Rice, Dan. (October, 2009). *Asking for principal gifts – 5 approaches*. Presented at the National Conference on Philanthropic Planning, October 14-17, National Harbor, MD. p. 2.



Reverse questions

A statement triggers a question:

“I help donors give smarter.”

→ “How do you do that?”

“I help people give weird assets to [charity].”

→ “What’s the weirdest asset someone has given?”

This gives permission to share a story

Their question gives you permission to share a story

Your story

- Your advice helps someone like the donor
- They give an asset instead of cash

Ends with a question

- “Have you ever made any unusual investments?”
- “Have you ever been hit with capital gains taxes?”



Follow-up questions

“Have you ever made any unusual investments?”

- Yes? Ask about it. “Has it gone up in value?”
- No? Ask about it. “So, do you like stocks or bonds or something else?”



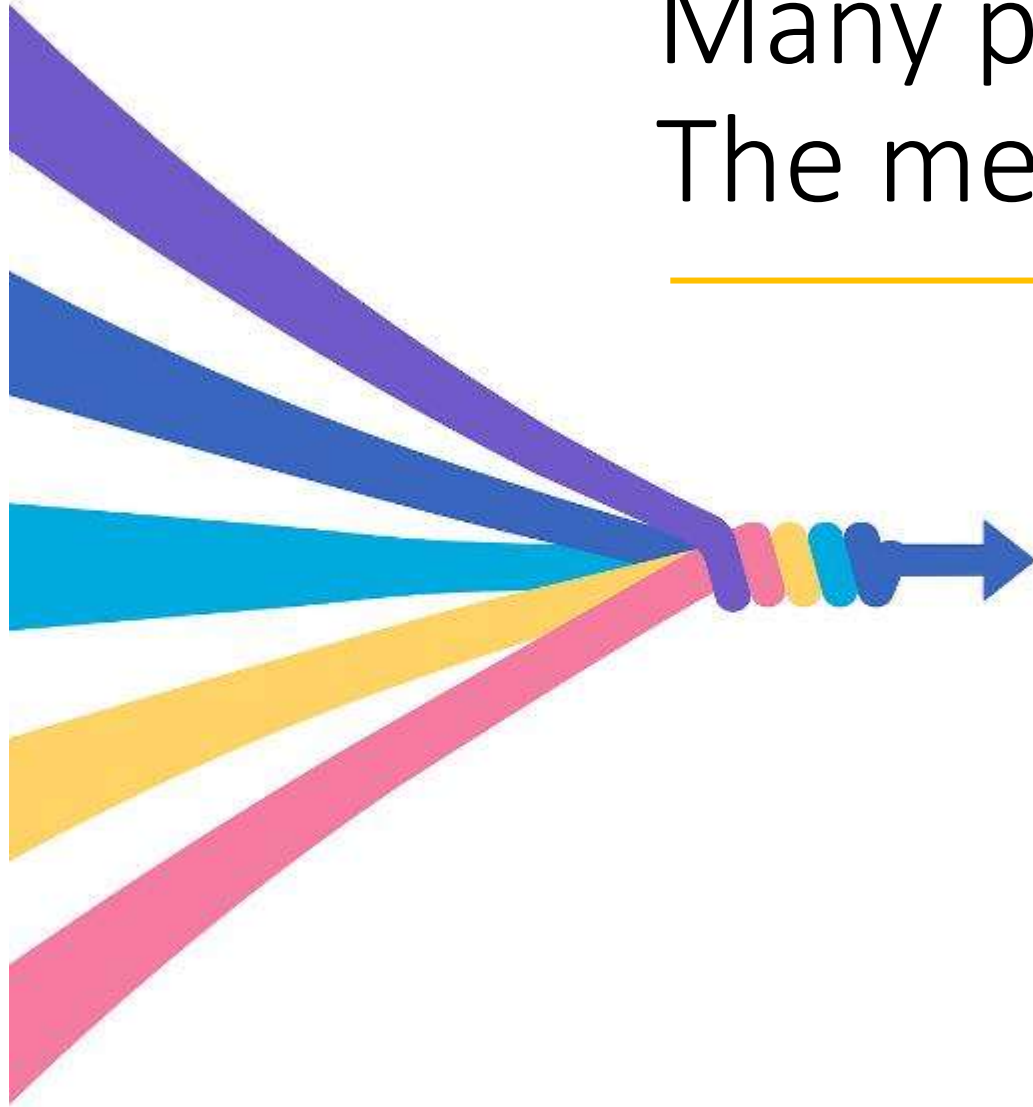
Follow-up questions

“Have you ever been hit with capital gains taxes?”

- Yes? Ask about it. “That must mean you were good at investing! Tell me what happened!”
- No? Ask about it. “That’s smart. It’s good to avoid those as long as you can. Do you think it might be a problem in the future?”



Many paths, one destination: The meeting to share options



“This reminds me of another donor’s situation. I remember he used some creative planning that [*avoided taxes/created income/provided for family*] and made a big impact at the charity. Would you mind if I talk to some of our experts and put together a few ideas for you to look at?”

IDENTITY: Start with the donor's philanthropic identity

1. Find your people group: The wealth holders
2. Find their donor joy: Help them define a personally meaningful victory from their identity (personal values, life history, and social/family norms)

CHALLENGE: Deliver the heroic challenge

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The fundraiser archetype

In the universal hero's journey story, a guiding sage helps the hero

The guiding sage:

- Gives advice, planning, and guidance
- Introduces the hero to friends and allies
- Provides a magical instrument or weapon



The fundraiser archetype in the donor's hero story



The effective fundraiser can be the guiding sage for the donor's hero story

- Gives advice, planning, and guidance
- Introduces the hero to friends and allies (technical experts, past donors)
- Provides a magical instrument or weapon (gift instruments and agreements)



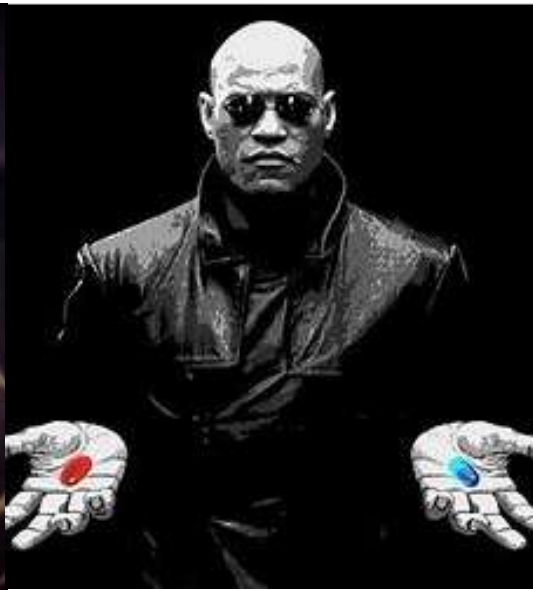
The fundraiser is the guiding sage in the donor hero's journey

- The nonprofit is the donor's magical instrument used to achieve a compelling victory
- The guiding sage fundraiser challenges with a heroic choice, coming alongside the donor to provide guidance, advice, and planning

The guiding sage role continues after the hero accepts the challenge

- Provides advice, guidance, and planning
- Introduces the hero to friends and allies
- Gives powerful instruments/weapons to the hero

**Fulfilling these monomyth
role functions attracts donors**



**Would
definitely
contact**

**Very
likely
to contact**

**Somewhat
likely
to contact**

**Somewhat
unlikely
to contact**

**Very
unlikely
to contact**

**Would
never
contact**

Who at the charity are you more likely to contact?

- Gift of stock
- Real estate gift
- Charitable gift annuity
- Gift in a will

5,621 People Surveyed.

Each person chose from only 13 titles for each scenario. Scenarios and titles were rotated among ten different respondent groups balancing alphabetical and reverse alphabetical title order.





Tested 63 Titles

Chief Advancement Officer; Advancement Development; Business Development; Campaign; Charitable Estate Planning; Development; Donor Development; Donations Consultant; Donor; Donor Assistant; Donor Counselor; Donor Ombudsman; Donor Relations; Estates; Executive; External Relations; Finance; Financial; Financial Advisor for Donors; Fundraising; Gift Planner; Gift Planning; Individual Giving; Institutional Advancement; Leadership Gifts; Legacy Planning; Major Gifts; Philanthropic Strategist; Planned Gifts; Planned Giving; Real Estate Gifting; Resource Development; Special Gifts; Stewardship

Director of Advancement; Advancement Development; Advancement/Planned Giving; Annual Giving; Charitable Estate Planning; Charitable Planning; Complex Gifts; Development; Development & Marketing; Donor Advising; Donor Assistance; Donor Development; Donor Relations; Donor Guidance; Estate & Gift Planning; Estates; Finance; Fundraising; Institutional Advancement & Gift Planning; Institutional Advancement; Legacy Planning; Major Gifts; Major Gifts & Legacy Planning; Personal Philanthropy; Philanthropic Opportunities; Philanthropy; Planned Gifts; Planned Gifts & Grants; Planned Giving; Planned Giving & Estate Administration; Planned Giving & Finance; Planned Giving Development; Resource Development; Stewardship; Stewardship & Development; Trusts & Estates; Trusts, Estates & Gift Planning

Gifts of stocks, real estate, CGA, and will

Best 10 Titles (63 tested in all cases)

1. (do) Trusts, Estates & Gift Planning
2. (co) Financial Advisor for Donors
3. (do) Estate & Gift Planning
4. (do) Planned Giving & Finance
5. (do) Donor Advising
6. (do) Planned Giving & Estate Administration
7. (do) Charitable Estate Planning
8. (co) Gift Planner
9. (do) Charitable Planning
10. (co) Donor Guidance

Worst 10 Titles (63 tested all cases)

1. (do) Advancement
2. (do) Institutional Advancement
3. (co) Advancement
4. (do) Development & Marketing
5. (co) Business Development
6. (co) Institutional Advancement
7. (co) Advancement Development
8. (do) Development
9. (do) Advancement Development
10. (co) External Relations



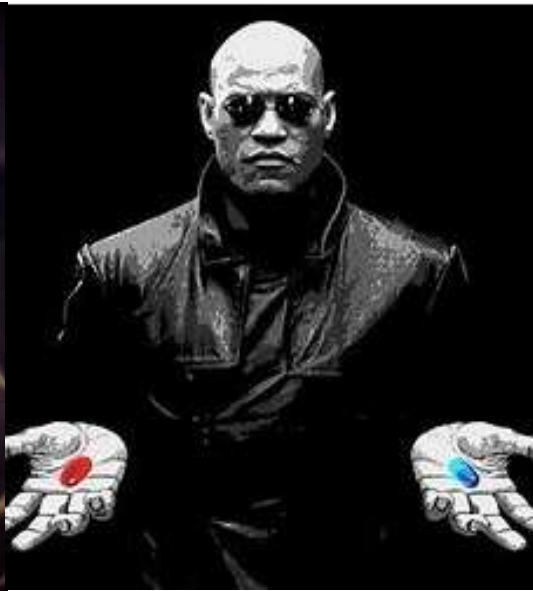
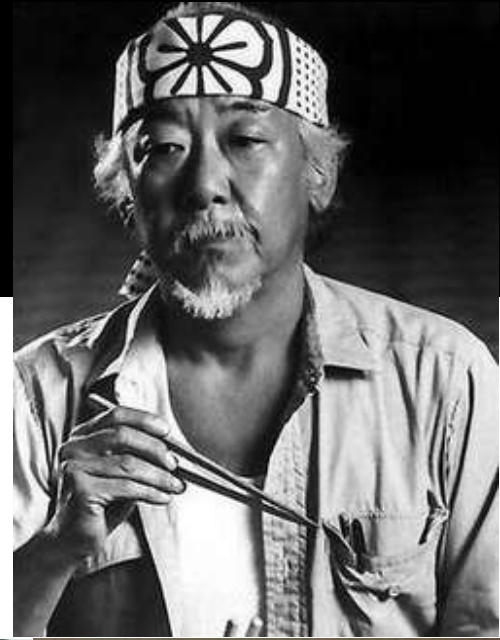
Advising against interest

- Advising a donor to make a gift later, or smaller, or to a different organization, or from a complicated asset, or through a donor advised fund, or with more restrictions, or with income benefits can establish a true advisor relationship
- Delivering value to donors in this way results in greater giving to the organization

The guiding sage

- Provides advice, guidance, and planning
- Introduces the hero to friends and allies
- Gives powerful instruments/weapons to the hero

What barriers prevent fundraisers from fulfilling this monomyth role in the donor hero's journey?



Actual Gandalf: “Bilbo Baggins, I am looking for someone to share in an adventure!”

Bad Gandalf: “I’m so sorry to inconvenience you, but if you might consider a short walk outside the shire, I would really appreciate it. Any time you could spare would help.”

A challenge to heroism
= asking to capacity

The sage challenges with a heroic choice



A challenge to heroism = asking to capacity



Joshua Birkholz's team analyzed nearly 1,000 gift officers. The top 20 percent highest producing fundraisers raised nearly 75 percent of the total dollars. What was different about these high performers? They usually asked for 100 percent of the donor's capacity rating. In comparison, "The bottom 80 percent tended to ask for about 40 percent of the capacity ratings."

Congratulations, you got a “No”!

- Making a compelling, heroic challenge is an accomplishment
- It's not every day that people receive an epic “call to adventure”
- The ask can make a lasting impact even when the answer is “no”



Expert advice from ten books on fundraising



- “Persistence is the name of the game.”¹
- “In other words, persistence can pay.”²
- “Polite persistence pays!”³
- “Persist and you’ll see the payoff.”⁴
- “Your persistence will make you successful.”⁵
- “Persistence is key.”⁶
- “Be persistent.”⁷

Entire sections titled:

- “BE persistent”⁸
- “Persistence”⁹
- “And now a final word – persistence”¹⁰

¹ Baker, B., Bullock, K., Gifford, G. L., Grow, P., Jacobwith, L. L., Pitman, M. A., Truhlar, S., & Rees, S. (2013). *The essential fundraising handbook for small nonprofits*. The Nonprofit Academy. P. 172; ² Eisenstein, A. (2014). *Major gift fundraising for small shops: How to leverage your annual fund in only five hours per week*. CharityChannel Press. p. 70; ³ Phillips, G. (2013). *The art of fundraising*. Phillips OnLine. p. 29; ⁴ Craver, R. M. (2017). *Retention fundraising: The new art and science of keeping your donors for life*. Emerson & Church, Publishers. p. 44; ⁵ Kihlstedt, A. (2013). *Asking styles: Harness your personal fundraising power*. CharityChannel Press. p. 31; ⁶ Klein, K. (2009). *Reliable fundraising in unreliable times: What good causes need to know to survive and thrive*. Jossey-Bass. p. 85; ⁷ Dillon, W. P. (2012). *People raising: A practical guide to raising funds*. Moody Publishers. p. 100; ⁸ Greenhoe, J. (2013). *Opening the door to major gifts: Mastering the discovery call*. CharityChannel Press. p. 37; ⁹ Ross, B., & Segal, C. (2008). *The influential fundraiser: Using the psychology of persuasion to achieve outstanding results*. John Wiley & Sons. Part V Persistence – Chapters 10, 11, and 12; ¹⁰ Morton, S. (2014). *Funding your ministry: An in-depth, Biblical guide for successfully raising personal support*. Tyndale House Publishers, Inc. p. 202.

Plan to “fail” and persist



- If any single behavior separates the successful fundraisers, it is this: Persistence
- The right story emotionally supports the right behaviors
- The “no” is not a source of pain; it’s an important step in the journey

The “no,” is no problem
for the persistently helpful
guiding sage

- The sage resumes the story role
- The sage resumes the story cycle
- The sage persists

“You think Yoda stops teaching,
just because his student does
not want to hear? A teacher
Yoda is. Yoda teaches like
drunkards drink, like killers kill.”
-Yoda



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Change your language: Were they ready?

Did the donor give or not?

- A “no” is a dead end.

Was the donor ready to give?

- A “no” is a starting place. It leads to questions and next steps.
- Why not? What was missing? What still remains to be done?



Plan to fail



- In the monomyth, the hero first refuses the call to adventure. In advancing the donor's hero story, a "no" is a typical part of the process. Understanding this means we plan for it.
- Don't leave the ask until the end: A "no" can be an excellent start, but the follow up takes time.
- Don't be disappointed: It's a standard part of the journey.

Challenge



Identity ← Victory



Affirm the story connections

Begin with points of agreement

Goal: Elicit the donor's confirmation of giving motivations (i.e., story connections)

Challenge



Identity ← Victory



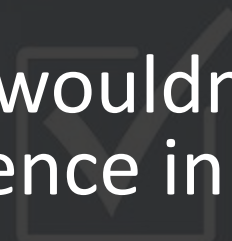
Affirm the story connections

“You’ve been a supporter for so long and have done so much, I was certain you felt positive about our work and our vision. Do you still feel that same friendship and support?”

Challenge



Identity ← Victory



Affirm the story connections

“Are you concerned that the organization wouldn’t be effective at using this gift to make a difference in the lives of these students?”

Challenge
↗ ↘
Identity ← Victory



Affirm the story connections

“I remember the last time we met, you said that it was very important to you that ... *[insert the “victory” the gift accomplishes]*. Has that changed for you?”

Challenge
Identity  Victory 




Affirm the story connections

First, “clarify” what the objection is NOT. This re-establishes the donor’s motivation for the gift and reminds him why this goal is part of his story and important to him.



Confirming
the story
connections
reframes the
objection

The objection becomes a barrier
preventing the donor from
accomplishing his goals such as,

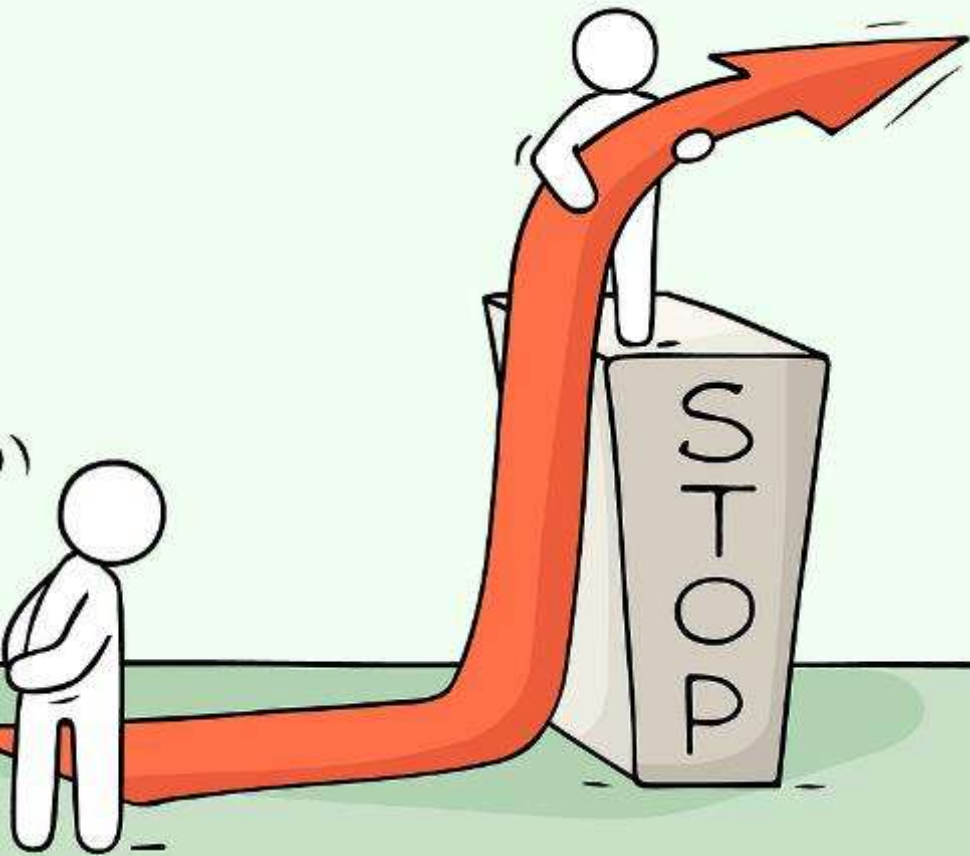
- “*Your* named scholarship fund”
- “The joy *your* gift will bring these patients”*

NEXT STEP

Diagnose the story barrier

- What's the issue? Is it the cause? The organization? The project? The amount? The timing?
- The donor attaches the "no" to an external barrier. The guiding sage comes alongside to help work on the problem together.





Diagnose the story barrier

“By turning the objection into an objective, you’ve put yourself on the same side of the table as the other person. Now you both are working together to figure out how to help the donor make the gift. You’ve taken a possibly challenging problem and made solving it a team effort.”

-Mark Pitman

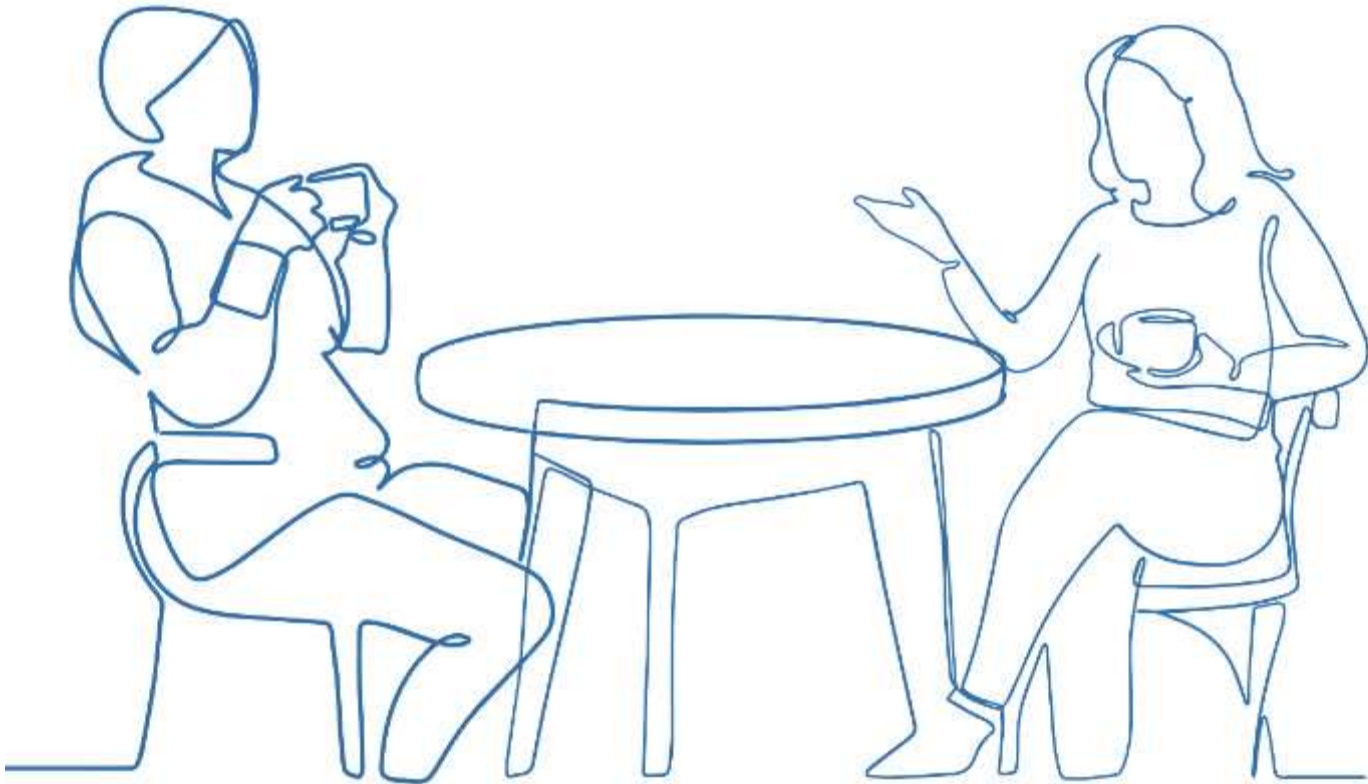
Isolate the story barrier

“It sounds like you would like to invest in our school, but right now you can’t see how you might do it. Am I right about that?”



Wohlman, J. (2020). *Practice the ask and negotiation (part 3)*. [Video transcript]. Major and principal gifts course. University of California, Davis. <https://www.coursera.org/lecture/major-principal-gifts/practice-the-ask-and-negotiation-part-3-bxhL5>

Isolate the story barrier: Elaboration questions



“You said you ‘didn’t think you could swing that much.’ Tell me more about that. Is this an issue of timing, other obligations, liquidity, or something else?”



Attack the story barrier



Obi-Wan gives Luke a light saber. Gandalf shows Bilbo where to find the ring. Morpheus teaches Neo “kung fu.” Dumbledore gives Harry Potter the invisibility cloak.

The guiding-sage fundraiser comes alongside the donor to help attack the barrier, so the donor-hero can complete the journey.

Attack the story barrier: It's too much money!

“We’re not asking for a gift right now, just a pledge. As long as you can start your payments within the next three years, a pledge is just as good as a gift.”



Grover, S. R. (2006). *Capital campaigns: A guide for board members and others who aren't professional fundraisers but who will be the heroes who create a better community.* iUniverse. p. 105.

Attack the story barrier: It's too much money!



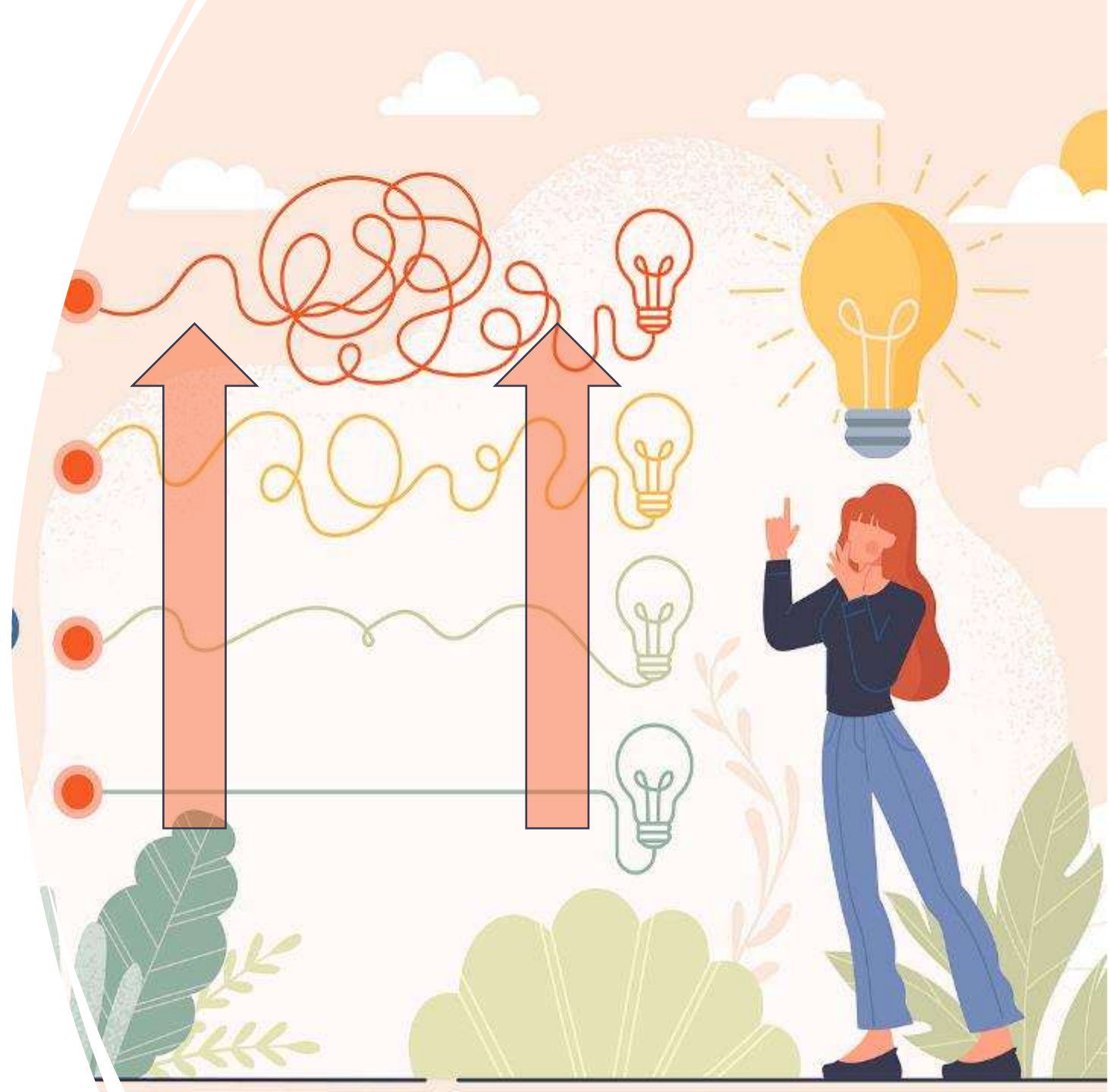
They say: “\$25K is too much. You say: “How about that over five years? \$5K per year?”

Or

“We’re not asking that you write a check today. Our pledge period goes up to four years, so it would be \$125,000 each year.”

Attack the story barrier: Complex options

- If the quick solution doesn't work, move to more complex options
- Now, the goal might change to agreement to *the next* meeting which will present the complex solutions

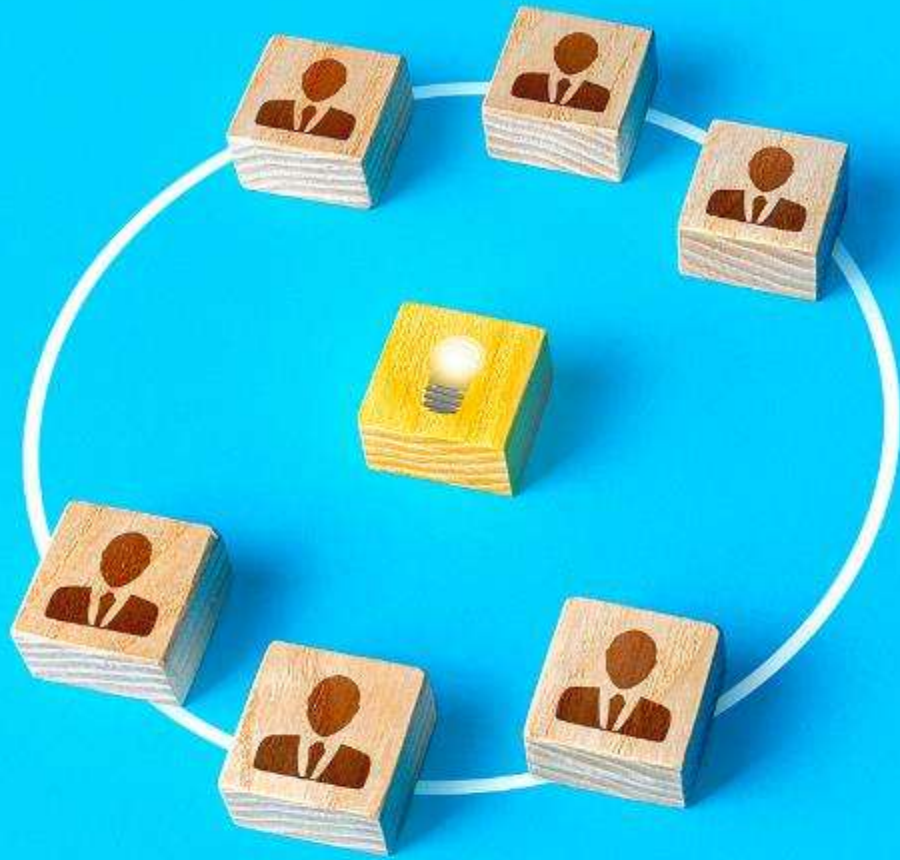




Presenting a solution: Feel, felt, found

DONOR: I would love to do this, but I'm on a fixed income. (Or I'm saving for retirement.)

YOU: I understand how you feel. Many of our donors have felt the same way. They have found that they can make a gift that pays them income for life. Or they can add a gift in a will that costs them nothing today. What are your thoughts about that?



Presenting a solution: Feel, felt, found

DONOR: All my assets are tied up right now. The cash just isn't available.

YOU: I understand. We work with many donors like you in this same position. It's actually the perfect situation. The tax benefits are much better if you give before you've sold the asset. Would you mind if I put together some options for you? I think you might be surprised at what the numbers look like.

Attack the story barrier: Permission to share complex options



“If you wouldn’t mind visiting again, I’d like to work with some experts and put together a few personalized options for you. There’s no obligation, but I think you’ll find some of them really interesting. Would your calendar allow us to meet on Tuesday the 15th at this same time?”



Don't start by conceding

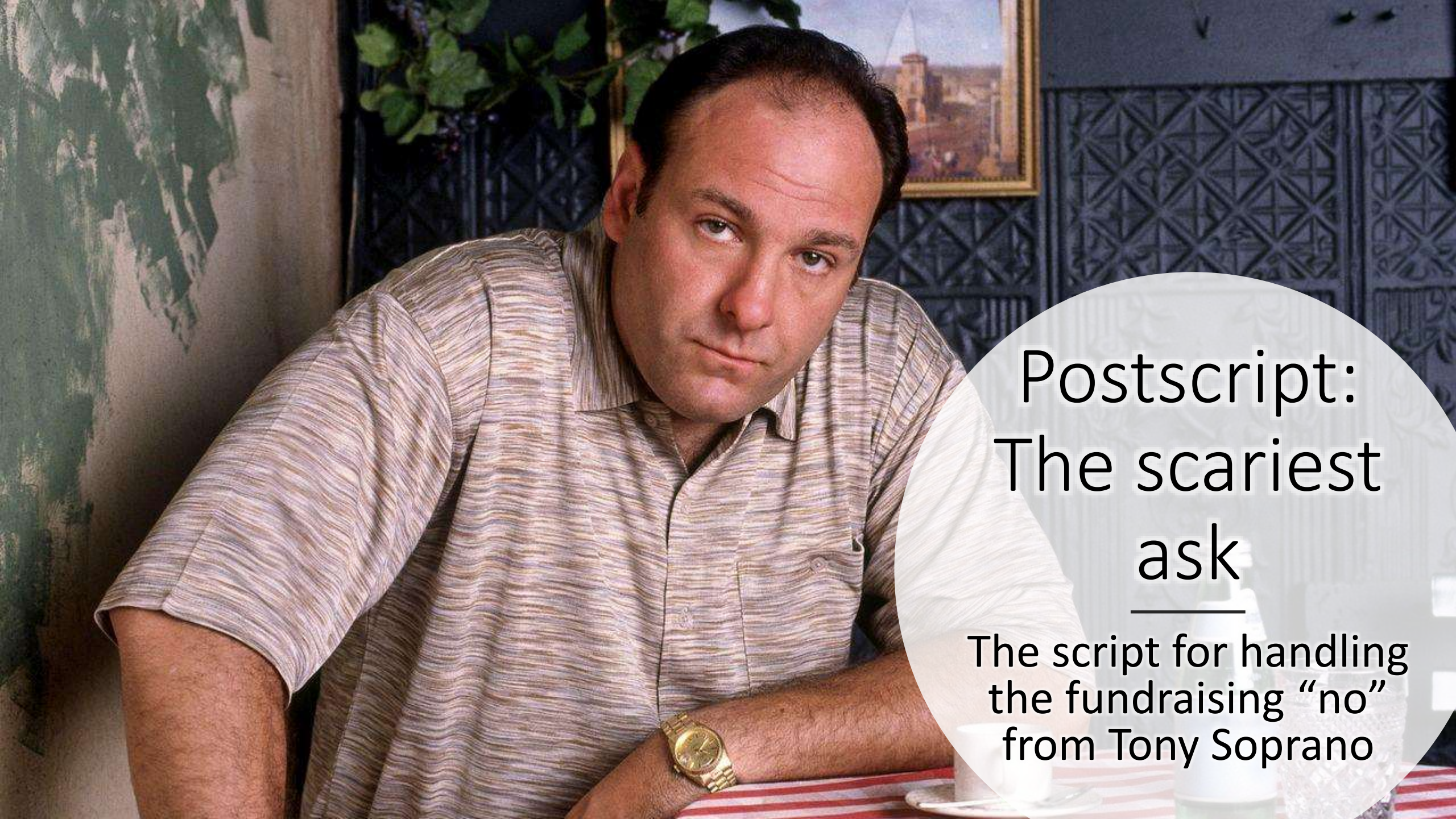
If a donor objects
to the amount,
“First and
foremost, please
do not say, ‘What
did you have in
mind?’”

-Laura Fredricks



Why not just concede?

- The role of the guiding-sage fundraiser is to help the donor accomplish a heroic victory.
- If the donor isn't interested in the stretch gift, then something is missing. Is it the project, the charity, the timing, the amount?
- Don't trade the hero's journey for a quick "go away" gift. That's not the role.



Postscript: The scariest ask

The script for handling
the fundraising “no”
from Tony Soprano

Part I: Listen.
Reflect. Ask for
permission to ask.

I. Resume the
guiding-sage role

1. **Be silent.** Silence creates space for a donor to explain. It implies, "I am listening to you."
2. **Make a reflective statement.** This implies, "I hear you."
3. **Ask for permission.** Asking, "Can I ask you a question?" puts the donor in charge. Permission allows the fundraiser to resume the Socratic, guiding-sage role.



YOU: ... would you consider a gift of a million dollars to kick off the campaign for the Anthony and Carmelo Soprano Athletic Center at the St. Thomas High School?

TONY: [*Laughter.*] You've got to be kidding me!

YOU: [*Silence... but you smile, reflecting his response.*]

TONY: A million bucks! I don't know what you've been smoking, but I want some!

YOU: OK, OK [*Smiling*], I understand. [*This shows reflection.*]

YOU: Help me out here. Do you mind if I ask a couple of questions to see where I got off track? [*This asks for permission.*]

TONY: Yeah, I'm not giving you a million bucks. That's where you ***ing got off track!

Part II: Resume the story cycle (Affirm story connections)

II. Resume the story cycle

4. **Affirm the story connections.** Shows why the donor wants to be part of this journey.
5. **Diagnose the story barrier.** What is keeping the donor from saying "yes"?
6. **Isolate the story barrier.** Confirm this as the only barrier ["no" → contingent "yes."]
7. **Attack the story barrier.** Ask for permission to share options that address the barrier.

Challenge
↗
Identity ← Victory





YOU: [*Smiling.*] I hear what you're saying.
[*This shows reflection.*]

[*Now, you resume the story.*]

Look, I know you've supported this school for years. Everyone in the community sees you as a leader at the school. We've been part of your life, and your family's life for such a long time, so I've got to ask, have your feelings about the school changed? [*This affirms the story. It shows Original Identity → Challenge.*]

TONY: No, no. Look, the school's a good thing. That's fine. But I'm more of a '\$20 bill in the G-string' guy, not a "buy her a whole **ing house" guy, right?

Part II: Resume the story cycle (Affirm story connections)

II. Resume the story cycle

- Affirm the story connections.** Shows why the donor wants to be part of this journey.
- Diagnose the story barrier.** What is keeping the donor from saying "yes"?
- Isolate the story barrier.** Confirm this as the only barrier ["no" → contingent "yes."]
- Attack the story barrier.** Ask for permission to share options that address the barrier.

Challenge
↗
Identity ← Victory



YOU: I understand. Now, the people running the school ... you've known Mrs. Gallo for, what, 12 years? Do you feel like they would use the building in the right way to make the kind of impact you would want to see? [*This affirms the story. It shows Challenge → Victory.*]

TONY: Sure, these are good people. I don't see them doing stupid things.



Part II: Resume the story cycle (Affirm story connections)

II. Resume the story cycle

4. **Affirm the story connections.** Shows why the donor wants to be part of this journey.
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Challenge
↗ ↘
Identity ← Victory



YOU: And this project – The Soprano Athletic Center – do you see that as making a real impact in our community here for a long time? It would have been a big deal for you when you were a kid growing up here, right? *[This affirms the story. It shows Victory → Enhanced Identity.]*

TONY: Oh, sure, it's a good thing. Give the kids something to do instead of robbing or breaking stuff. But look, I'm not going to pay for this whole thing now. Maybe someday when I retire rich, I can write you that check.



Part II: Resume the story cycle (Diagnose & isolate the story barrier)

YOU: So, it sounds to me like this is a gift you would want to make if you could, but the finances are just too much right now? [*This diagnoses and isolates the story barrier.*]

TONY: Yeah, that's just the wrong price tag for me.

II. Resume the story cycle

4. **Affirm the story connections.** Shows why the donor wants to be part of this journey.
5. **Diagnose the story barrier.** What is keeping the donor from saying "yes"?
6. **Isolate the story barrier.** Confirm this as the only barrier ["no" → contingent "yes."]
7. **Attack the story barrier.** Ask for permission to share options that address the barrier.

Challenge
↗ ↘
Identity ← Victory



STEP 5: Diagnose the story barrier

- What's the issue? Is it the cause? The organization? The project? The amount? The timing?
- The donor attaches the "no" to an external barrier. The guiding-sage comes alongside to help work on the problem together.



STEP 6: Isolate the story barrier

"It sounds like you would like to invest in our school, but right now you can't see how you might do it. Am I right about that?"



Part II: Resume the story cycle (Attack the story barrier)

YOU: Now, you know this is a pledge that can be paid out over the five-year campaign. So, that's \$200,000 each year. Does that help at all? [*This attacks the story barrier.*]

TONY: I don't know. That's still a lot of cash.

YOU: Yes, it is. Let me ask you, have you ever thought about giving stocks or real estate instead?

TONY: [*Gives a quizzical look.*]

II. Resume the story cycle

4. **Affirm the story connections.** Shows why the donor wants to be part of this journey.
5. **Diagnose the story barrier.** What is keeping the donor from saying "yes"?
6. **Isolate the story barrier.** Confirm this as the only barrier ["no" → contingent "yes."]
7. **Attack the story barrier.** Ask for permission to share options that address the barrier.

Challenge
↗
Identity ← Victory ↘



Attack the story barrier: It's too much money!



They say: "\$25K is too much. You say: "How about that over five years? \$5K per year?"

"We're not asking that you write a check today. Our pledge period goes up to four years, so it would be \$125,000 each year."

Part II: Resume the story cycle (Attack the story barrier)

YOU: The reason I ask is that I work with a lot of folks in your situation. They want to make a really big impact with a great project, but the cost is too big of a barrier. So, here's what they do. They get the government to pay for more of it by being smarter about giving.

II. Resume the story cycle

- Affirm the story connections.**
Shows why the donor wants to be part of this journey.
- Diagnose the story barrier.** What is keeping the donor from saying "yes"?
- Isolate the story barrier.** Confirm this as the only barrier ["no" → contingent "yes."]
- Attack the story barrier.** Ask for permission to share options that address the barrier.

Challenge

↗ ↘

Identity ← Victory

	Feel	Felt	Found
Presenting a solution:			
	I understand how you feel. <i>[This is a reflective statement.]</i>	Others like you have felt that way. <i>[This begins a social norm.]</i>	Here is what they have found that worked. <i>[This presents a solution idea with a social norm.]</i>

Part II: Resume the story cycle (Attack the story barrier)

II. Resume the story cycle

- Affirm the story connections.** Shows why the donor wants to be part of this journey.
- Diagnose the story barrier.** What is keeping the donor from saying "yes"?
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 **Feel**

 **Felt**

 **Found**

Presenting a solution:
Feel, felt, found

- I understand how you feel. *[This is a reflective statement.]*
- Others like you have felt that way. *[This begins a social norm.]*
- Here is what they have found that worked. *[This presents a solution idea with a social norm.]*

YOU: Let me give you an example. Say someone has a building or some stocks worth \$200,000 – the annual pledge amount for this project. But maybe they bought it for only \$20,000. The problem is this. If they sell it, they don't get to keep the full \$200,000. Here in New Jersey, they might lose a third to the government in taxes. So, they actually walk away with only \$138,000.

TONY: Tell me about it. Those taxes are a racket!

YOU: But if they donate it instead, they avoid all those taxes. And they still get the full \$200,000 deduction off their income taxes. That deduction can save them up to 47 cents on the dollar.

Part II: Resume the story cycle (Attack the story barrier)

II. Resume the story cycle

- Affirm the story connections.** Shows why the donor wants to be part of this journey.
- Diagnose the story barrier.** What is keeping the donor from saying "yes"?
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Challenge
↗
Identity ← Victory ↘



Attack the story barrier: Complex options

If the quick solution doesn't work, move to more complex options. Now, the goal might change to agreement to the next meeting which will present the complex solutions.



YOU: So, if they sell the property, they net \$138,000. If they donate it instead, they net up to \$94,000. That's just a \$44,000 difference between selling and donating. The school still gets a \$200,000 gift. The tax benefits pay for the rest.

TONY: So, this thing. It works with a building, like a warehouse?

YOU: Sure, any assets that have gone up in value.

Part II: Resume the story cycle (Attack the story barrier)

II. Resume the story cycle

- Affirm the story connections.** Shows why the donor wants to be part of this journey.
- Diagnose the story barrier.** What is keeping the donor from saying "yes"?
- Isolate the story barrier.** Confirm this as the only barrier ["no" → contingent "yes."]
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Challenge
↗
Identity ← Victory



Attack the story barrier: Complex options

If the quick solution doesn't work, move to more complex options. Now, the goal might change to agreement to the next meeting which will present the complex solutions.



TONY: What about a business like an “entertainment establishment” or a used car dealership?

YOU: Definitely. I’d love to put together some ideas for you to look at. Just give me some examples of assets – what you paid, what they’re worth – no obligation. I know the Soprano Athletic Center seems like a reach right now, but I can work with our experts, put together a plan, and you just tell us what you think. Do you mind if we get together for a visit on Tuesday the 4th to look at some options?

TONY: I guess it wouldn’t hurt. Tuesday? ...



The heroic challenge can continue to influence the donor

In the monomyth, the hero
refuses the first call to adventure,
but things change

Things can change for donors, too

- Financial circumstances can shift
- Businesses can be sold
- Investments can go well
- Inheritances can arrive
- Estate plans can be revised

IDENTITY: Start with the donor's philanthropic identity

1. Find your people group: The wealth holders
2. Find their donor joy: Help them define a personally meaningful victory from their identity (personal values, life history, and social/family norms)

CHALLENGE: Deliver the heroic challenge

3. Talk wealth not income: Discuss the donor's past, present, and future asset story
4. Don't beg or bully: Walk alongside as a persistently helpful philanthropic wealth advisor

5. Make it feasible: Show their financial abundance to accept the heroic challenge

VICTORY: Help the donor experience a heroic victory

6. Deliver donor joy: Focus on the donor's impact, not the charity's
7. Deliver donor joy: Help them build a portfolio of visible results reflecting their identity
8. Deliver donor joy: Build a mutually supportive community for donors
9. Deliver donor joy: Serve as an instrument for their enduring impact
10. Deliver donor joy: The identity-fulfillment donor journey brings the best life experience

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6. Deliver donor joy: Focus on the donor's impact, not the charity's

7. Deliver donor joy: Help the donor collect beautiful works that express their individual character
8. Deliver donor joy: Build a mutually supportive community for donors
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10. Deliver donor joy: The identity-fulfillment donor journey brings the best life experience

The challenge must promise a victory



- The inciting incident disruption promises the hope of a solution
- “What changes if I give?”





Promising the
wrong victory

- The compelling victory is *the donor's* victory
- Charities often claim the victory to enhance *their own* identity

Promising the wrong victory in experiments



- One e-mail focused on the charity as the actor, e.g., “The fashion industry has let these women down, but [the charity] won’t”
- The other added the donor as an actor, e.g., “The fashion industry has let these women down, but you and [the charity] won’t”
- The odds of people clicking on the link to learn more were 27% higher for the second message

Victory barriers: Missing victory

- The donor gives to honor the charity insiders' heroic work
- This sounds great to charity insiders, but it's not that compelling for the donor



Victory barriers: Fundraising without victory



“What changes if I give?”

- What if the answer is “Nothing,” “I don’t know,” or “That’s not your concern; you just leave that to the experts”?
- Donors can still give just because of their identity connections with the charity, the cause, or the act of giving, but these gifts will tend to be small

Victory barriers: Fundraising without victory



- If you give \$100 just because you like the charity, how likely will you grow to like that charity 10X more? Pretty unlikely.
- So, how likely is it that you will give \$1,000 or \$10,000 instead of \$100? Same answer.

Victory
barriers:
Fundraising
without
victory



Without a victory,
only the small gift
makes sense. This is
the “pat on the
head” or social
compliance gift. It’s
like trying to win
the “participant”
award. It can
motivate a gift, but
not a large one.

Challenge
↑
Identity ← ~~Victory~~

Victory solutions



To get the rest of the gift, we need the rest of the story. The 10x or 100x gift must do something different. It must do something specific, visualizable, and compelling. It must promise the hope of a compelling victory.

Victory upgrade



Suppose a donor has written a check or included your charity in their will. After expressing gratitude, it's still possible to increase the size of the gift. How? By adding a victory.

- “Have you ever thought about how you would like this gift to be used?”
- “Tell me about your goals for this gift. What kind of impact do you want to make?”



“Have you ever thought about how you would like this gift to be used?”

“What kind of impact do you want this gift to make?”

These questions lead to conversations about outcomes

- Outcomes have price tags
- An outcome with a price tag leads to a challenge with a victory
- It can turn the gift into the initial gift

This can lead to an ask
with a victory

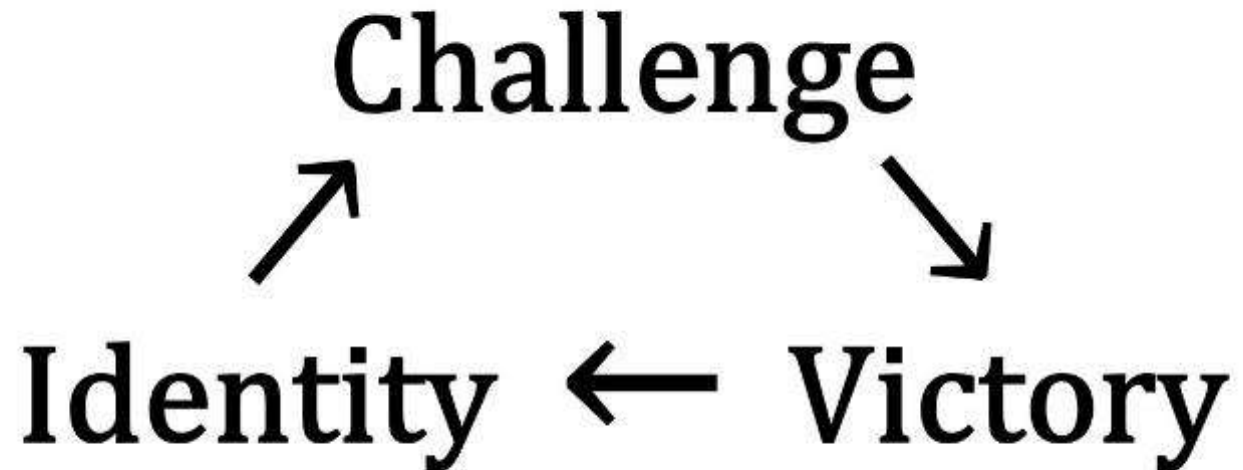


“The reason I ask is this. You remind me of another donor. She felt the same way you do. So, she decided to ...

- Establish a permanent scholarship fund
- Sponsor this operation for a week
- Fund a project that [insert victory outcome]

What are your thoughts about doing that?”

Delivering the donor
hero's journey
happens after the gift



The ask promises a
hope of victory.



Did the organization confirm the heroism of making the gift?

- Was there recognition of the gift?
- Was there gratitude for the gift?
- Was this expressed by the organization?
- Was it voiced by the beneficiaries?
- Was it confirmed by publicity of the gift?



Did the organization confirm the heroism of the usage of the gift?

- Was the use reported back to the donor?
- Was it described in a simple, tangible, visual way?

Did the organization confirm the heroism of the resulting impact of the gift?

- Was there recognition of the impact?
- Was there gratitude for the impact?
- Was this expressed by the organization?
- Was it voiced by the beneficiaries?
- Was it confirmed by publicity of the impact?



What did my gift accomplish?

6.

Deliver

donor joy:

Focus on the
donor's
impact, not
the charity's

A 2023 study: “we have surveyed both the donors and the fundraisers to understand their alignment.... What is the most valuable thing development offers to the donors? ... For the donors, “How my gifts are used” is the top or among the top three in nearly every survey. [It] rarely breaks the top three in the fundraiser surveys. The donor experience is the most valued and also most underinvested strategy in many development programs.”

Delivering donor joy is what the most successful modern fundraisers do

6.

**Deliver
donor joy:**

Focus on the
donor's
impact, not
the charity's

“When you’ve been in this field long enough, you recognize and experience the **exhilaration felt by donors** of time and money. It’s a genuine treat to witness **the joy they derive from doing good works**. It’s evidenced by **their smiles** and their eagerness to hear about **the impact of their gifts**.”

-Jim Eskin

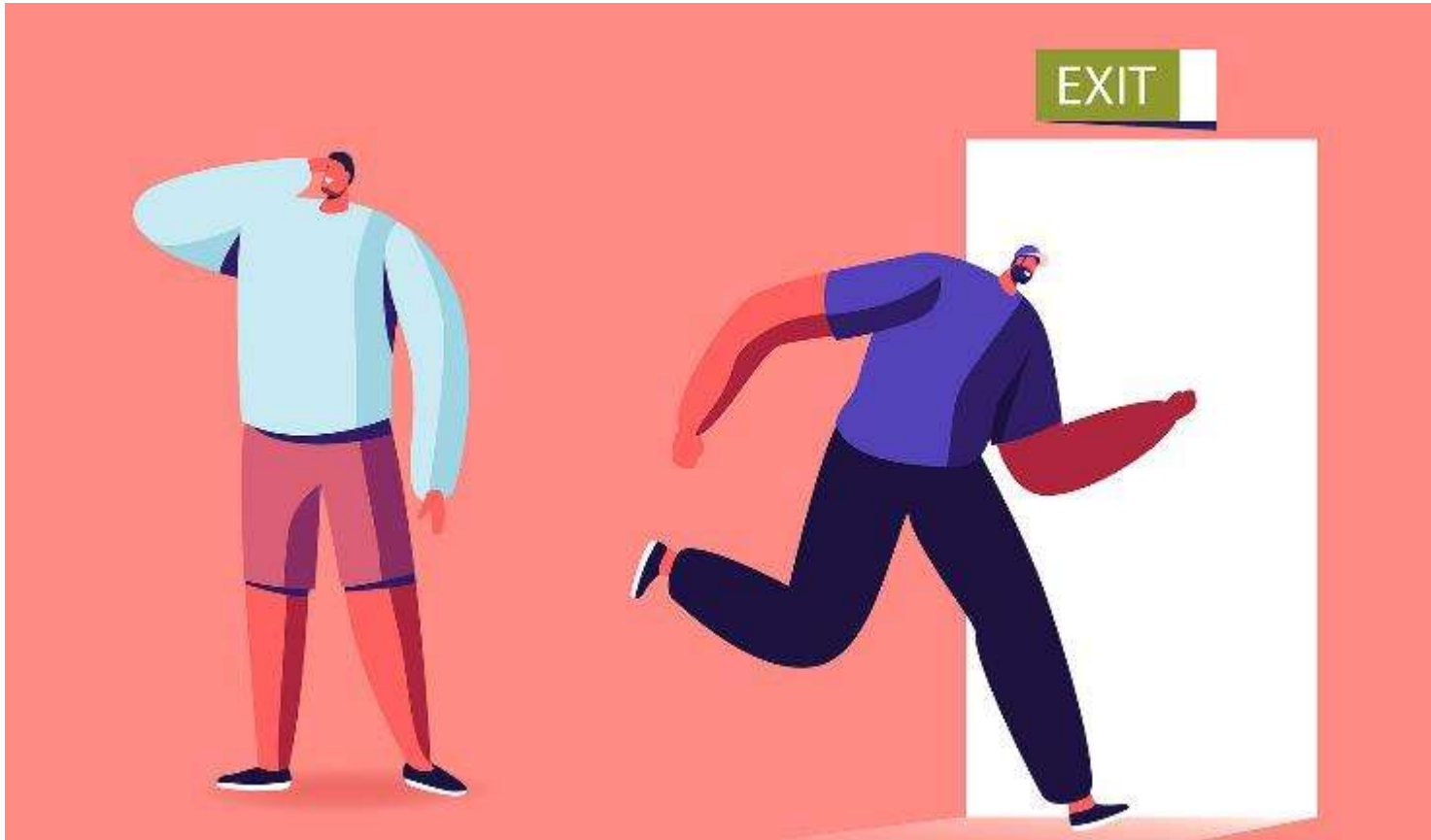
Delivering donor joy at the thank-you letter

6.

Deliver donor joy:
Focus on the donor's impact, not the charity's

In “The ten essentials of a perfect thank-you letter.” Rule number one is this: “1. Joy. You want, first and foremost, to make the reader—the donor, your friend, your supporter—**experience a genuine sense of joy** when they open your letter ... Suddenly, your **donor is a hero.**”

-Kirsten Bullock, et al.



The jester quits at the
punchline

- The donor is promised a heroic journey at the ask
- Then the donor is abandoned
- There is no confirmation of the heroism of the making of the gift, the usage of the gift, or the resulting impact of the gift



What happens? Donors leave

- 80% of first-time donors gave nothing to the charity in the following year
- What happened at the ask worked; they gave
- What happened after the ask didn't work; they didn't do it again



- They don't just promise to advance the donor's hero story
- They deliver on that promise

The guiding-sage finishes
the journey



Fundraising with the administrator hero story

- Look at how wonderful our organization is. Look at the many great things we are doing. We are worthy. We are inspirational. We are heroes. Give to us.
- Alan Clayton's translation: "Hello. I'm Alan. I'm great. Can I have some money, please?"

Opposing Worldview



In the administrator hero story:

- The donor is just an ATM
- The fundraiser is the stick used to whack the ATM



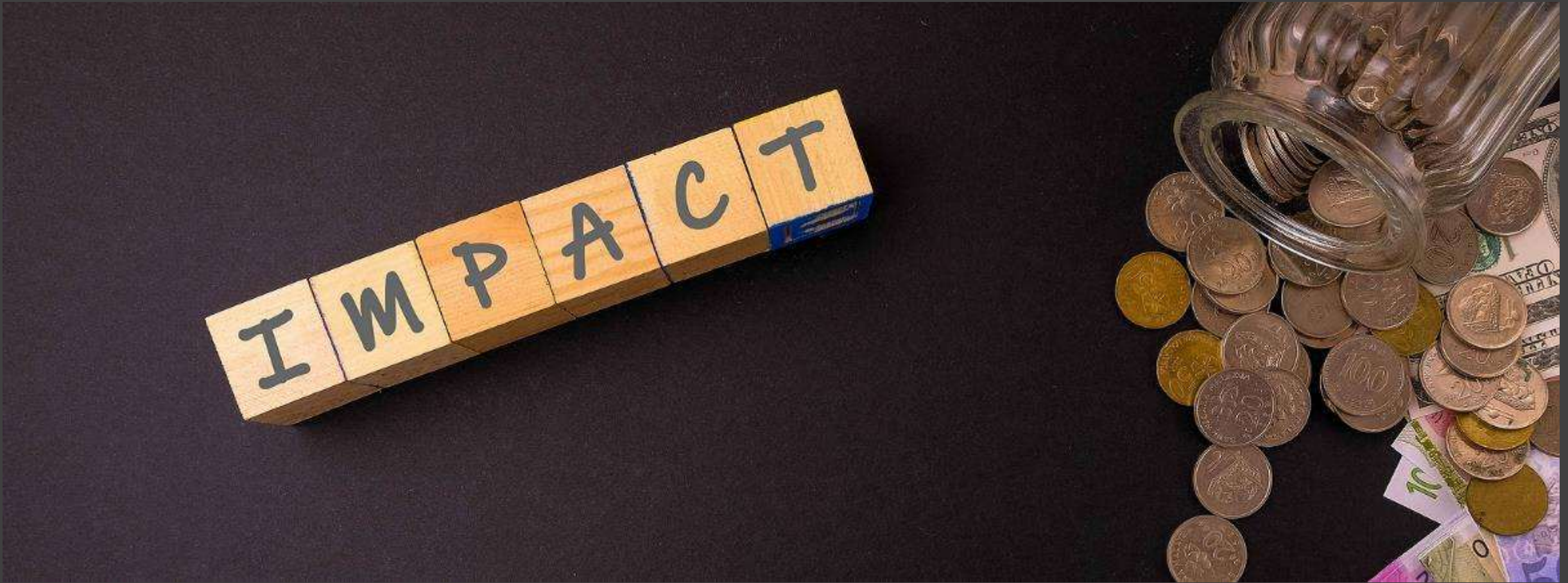
Administrators love their hero story

- They are extraordinarily attracted to their hero story
- That's why they work at a nonprofit!



The competitive problem of
the administrator hero story

- False assumption: Donations will result simply from proving the organization's greatness.
- Logic problem: Is this the greatest organization on the planet?



The donor's impact

- It's about the donor's impact, not the organization's impact
- If the donor's gift doesn't make an impact, there's no story reason to ever give



Defending the administrator hero story

- Donors should, “cut an unrestricted check and get out of the way.”
- Or “Fund people to do stuff and get the hell out of their way.”
- Or “The best thing supporters can do is to give resources that enable the institution’s leaders to do their work the best way they know how. Get out of their way, and let them build...”



Reality mismatch

- In the administrator hero story, people are supposed to give to administrative efficiency
- Fundraising is “creating a constituency which supports the organization because it deserves it”



The messaging problem of the administrator hero story

- It's logical. It's reasonable. And for fundraising, it's deadly.
- Translation: "Give me your money because I deserve it."
- Or "I know better than you how to spend your money. So, give me your money then keep your damn mouth shut. I am the expert here."

The path of the administrator-hero story



We need more administrator hero story!

These messages will create a few “pat-on-the-head” gifts, but not major gifts

Response: More tweets, posts, newsletters, events, and conversations to more people telling the administrator hero story



The
worldview
problem

Who is
the hero?

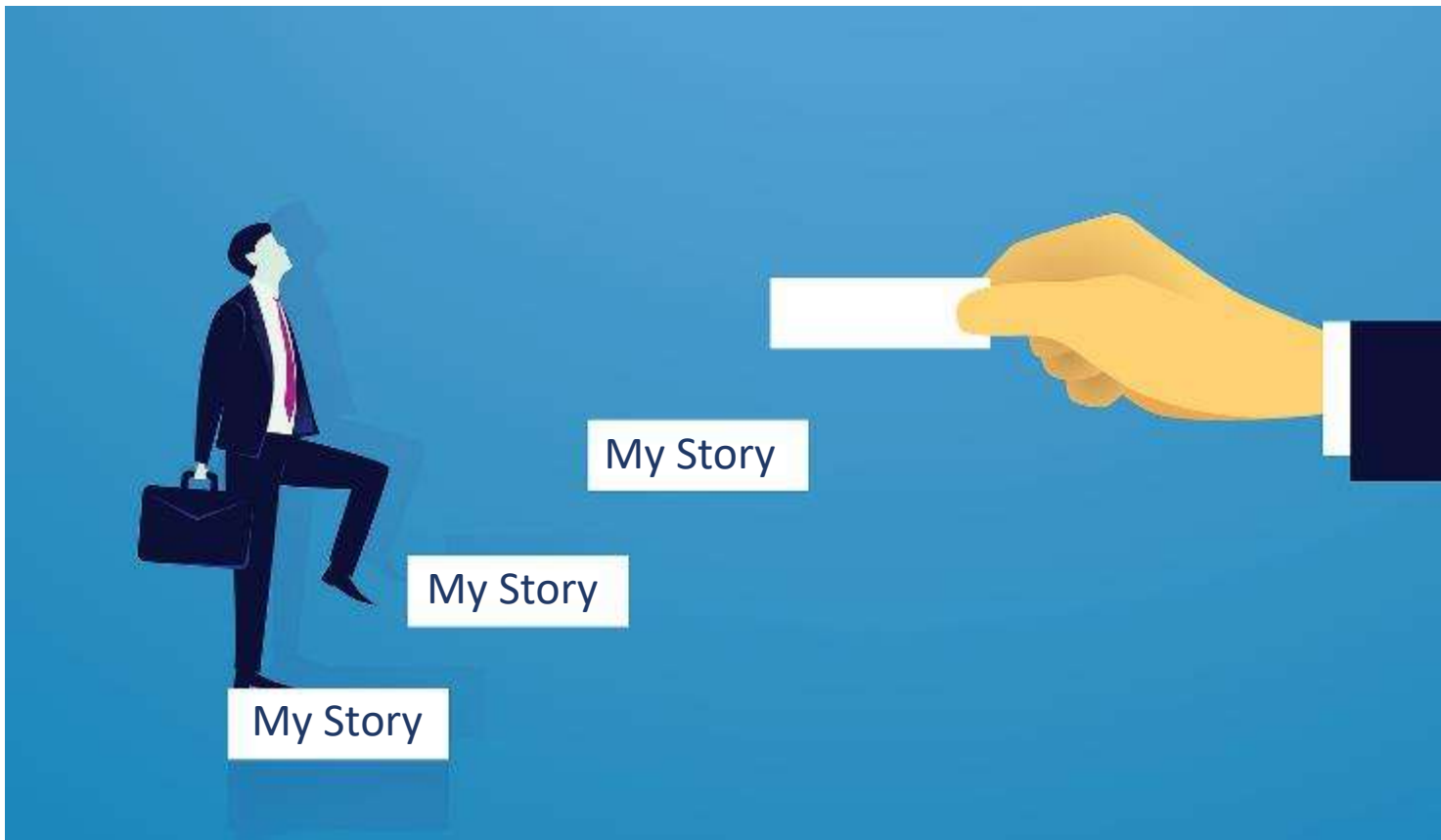


my Story

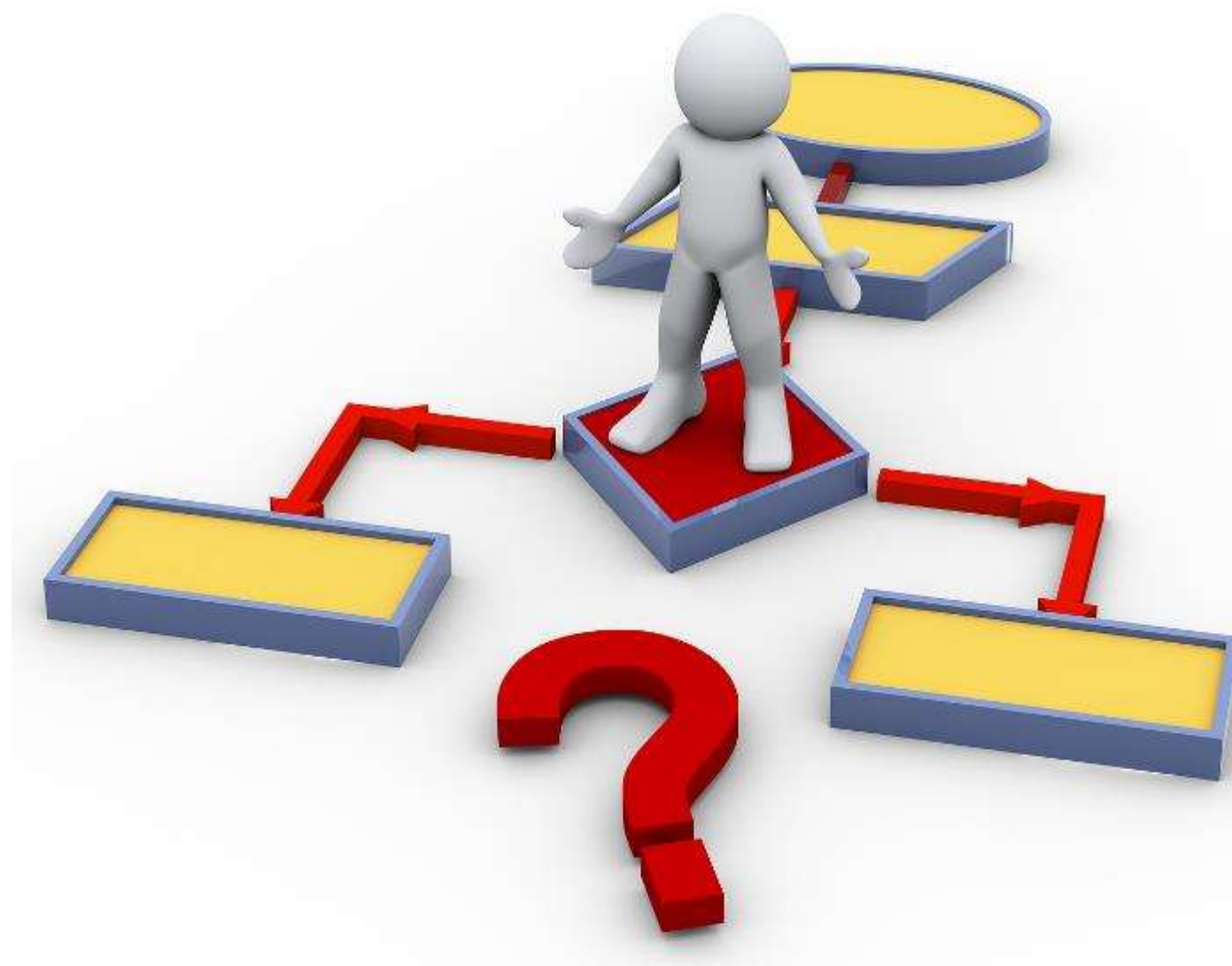
The competitive advantage of the donor's hero story

Others may be telling great stories, but they aren't telling the donor's story

The donor's impact



- Donors are motivated by their impact in their story
- Administrative efficiency is important only when it advances the donor's hero story



Isn't the organization important?

- Yes
- It's still part of the story, but there's a difference

Organization role change

- It becomes a means of advancing the donor's hero story
- It becomes the hero's instrument for impact





The hammer
is not the
hero

- In the hands of the heroic donor, the effective nonprofit can be a powerful hammer
- With the right hammer, the donor can make a massive impact
- But the hammer isn't the hero

Sell the hammer *to* the hero not *as* the hero

- The message is, “Imagine the impact you could make with this great hammer. You could use it to accomplish this personally meaningful result.”
- It’s not, “Look at the great things this hammer has done. Don’t you want to honor the hammer’s greatness with a donation?”



A man with short dark hair, a goatee, and glasses is shown from the chest up, looking upwards and to the left. He is holding a large hammer with a wooden handle and a blue metal head high above his head with his right hand. He is wearing a dark blue button-down shirt over a black t-shirt and a black wristband on his right wrist. The background is a plain, light gray.

The hammer is not the hero

The fundraiser's goal is to get the hero to pick up the (nonprofit) hammer and use it

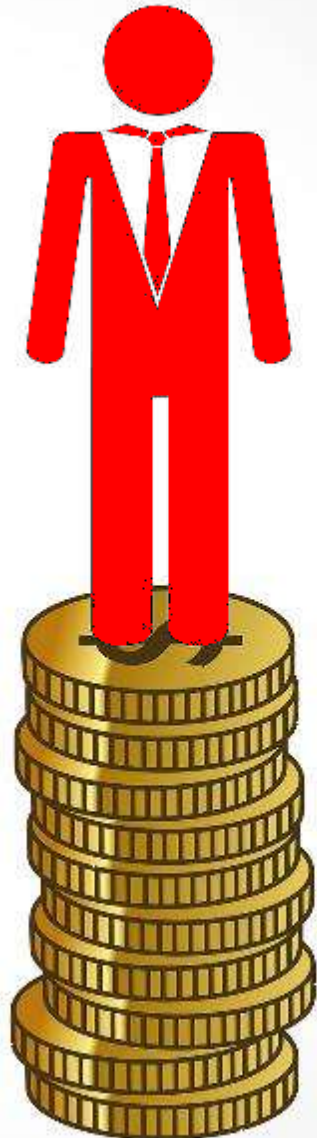
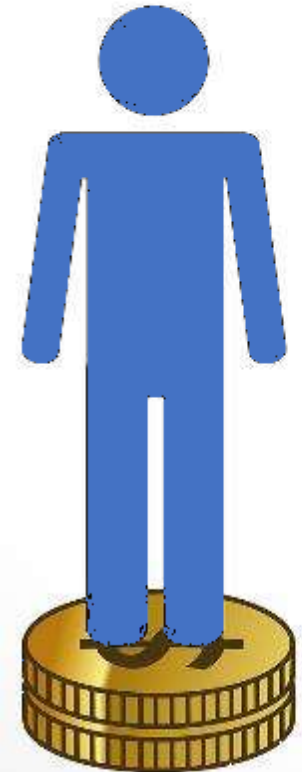
Practice: Charity strength

In the donor-hero story, the charity is the hero's powerful weapon. The charity encourages major gifts by projecting strength.

Reality: The largest donations go to the largest – often wealthiest – nonprofits. These are “strongest link” gifts. These donors “give to the best.”



Whillans, A. V., Caruso, E. M., & Dunn, E. W. (2017). Both selfishness and selflessness start with the self: How wealth shapes responses to charitable appeals. *Journal of Experimental Social Psychology*, 70, 242-250.



Wealth and identity

Testing: “Sometimes, one [**community** v. **person**] needs to come forward and [**support a common goal** v. **take individual action**]. This is one of those times. [**Join your community** v. **Take individual action**]. Donate today.”

- The high-social, community-focused heroic message worked better for less wealthy donors
- The high-ego, individual-focused heroic message worked better for wealthy donors

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“Do you have any lifetime charitable goals? Tell me about those.”

Steenhuysen, J. (October 2012). Philanthropy planning: What to say and do in the room with your donors/clients to explore and document their philanthropy mission. [Paper presentation]. National Conference on Philanthropic Planning, New Orleans, LA. p. 9.



“What would you like to accomplish with your money that would be meaningful to you?”

Advancement Resources. (November 15, 2017). The power of the pause: Using silence in donor conversations, [Web page] <https://advancementresources.org/the-power-of-the-pause-using-silence-in-donor-conversations/>

The Ideal Victory Portfolio

Lewzey, E. (2019). 4 powerful questions to ask your donors. [Website.] <https://www.blueskyphilanthropy.com/single-post/2019/05/15/4-powerful-questions-to-ask-your-donors>

“What are you trying to accomplish with your philanthropy and how might we help?”

Schiller, R. (October 2017). What are donors telling us? [Powerpoint slides]. National Conference on Philanthropic Planning, Baltimore, MD. p. 34.

“What do you hope to achieve with your philanthropy?”

“Tell me about a few other causes you support: why do you support them?”

Melvin, A. (2018, October). The ties that bind: Effective cultivation techniques. [Paper presentation]. Charitable Gift Planning Conference. Las Vegas, NV. p. 5



“Would you mind telling me about the causes that are most important to you?”

Muir, R. (November 17, 2015). 21 discovery questions to ask now. [blog]. <https://trust.guidestar.org/blog/2015/11/17/21-discovery-questions-to-ask-now/>

The Ideal Victory Portfolio

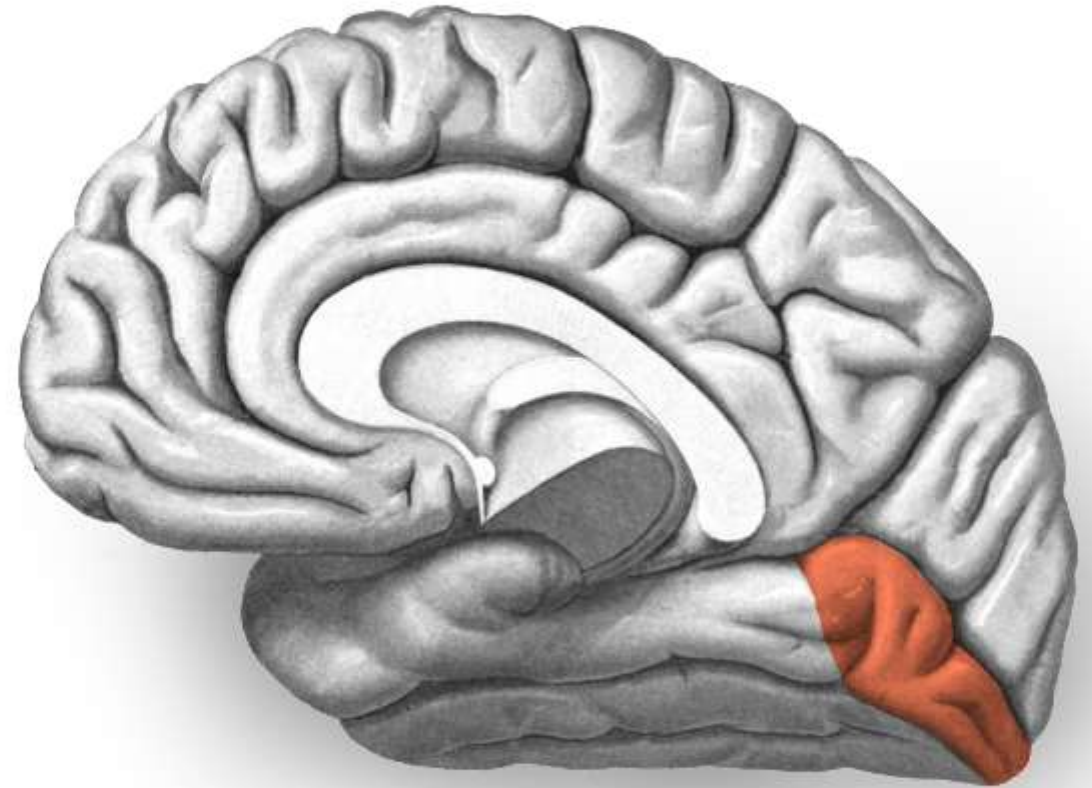
“Do you typically give to the same nonprofits each year?”

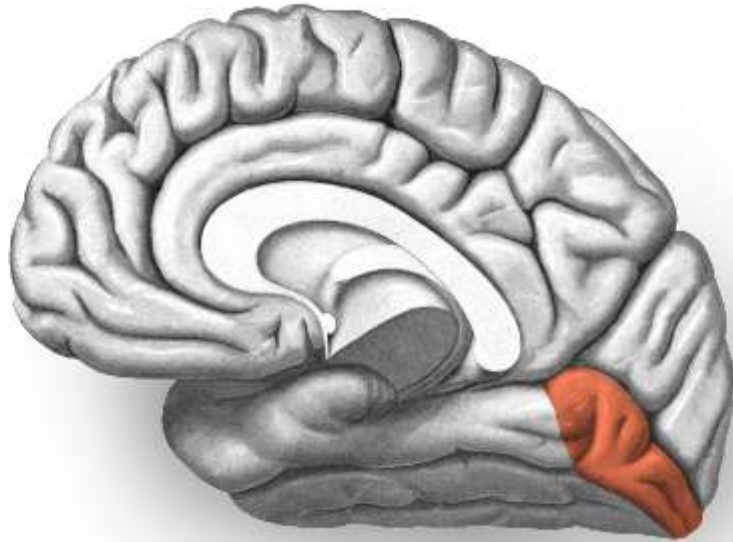
Sheffield, C. R. (August 14, 2019). Discovery: How to learn about a donor's assets. [Webinar slides]. <https://www.stelter.com/Documents/pdf/webinars/Stelter%20Discovery%20August-2019.pdf>

“Why do you support them?”

Visualization

- Lingual gyrus: complex scenes, faces, internal visualization, dreaming
- Reading sentences in a story format triggers dramatically more than disconnected sentences





Visual philanthropy

Charitable bequests

- Gifts of wealth holdings, not just disposable income
- Usually the largest donation a person will ever make
- More lingual gyrus activation meant more desire to make a charitable bequest gift

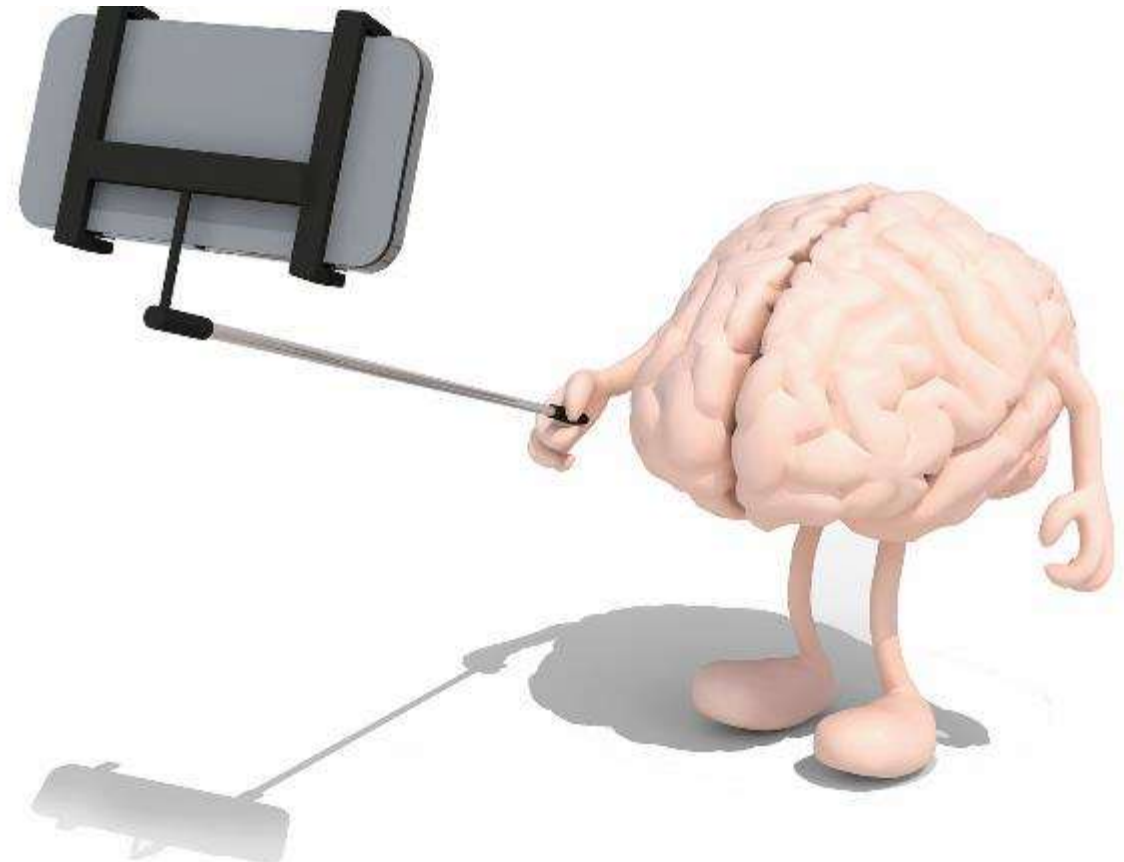
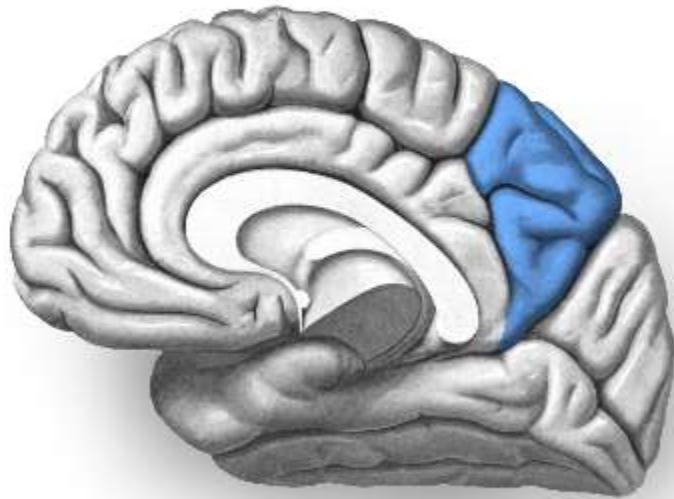


Not only visual story, but also the donor's story

Charitable bequests activated precuneus

- Area used when we take an outside perspective on ourselves
- Visual imagery of ***autobiographical*** memories

Precuneus



7.
**Deliver
donor joy:**
Help them
build a
portfolio of
visible
results
reflecting
their identity

Modern Fundraising Advice

“Remember that the role of an MGO [Major Gift Officer] is to experientially transport the donor right into the center of the problem the organization is addressing. If the MGO had a teleportation device, she could put donors in the middle of the action. They’d be able to hear, see, taste, and feel the experience. Until someone invents such a device, though, you must gather stories that take the donor to experience the sheer joy of seeing the need met.”

Perry, R. & Schreifels, J. (2014). *It’s not about the money: How to build authentic major donor relationships*. Veritus Group. p. 130.

Delivering donor joy in initial conversations

7.

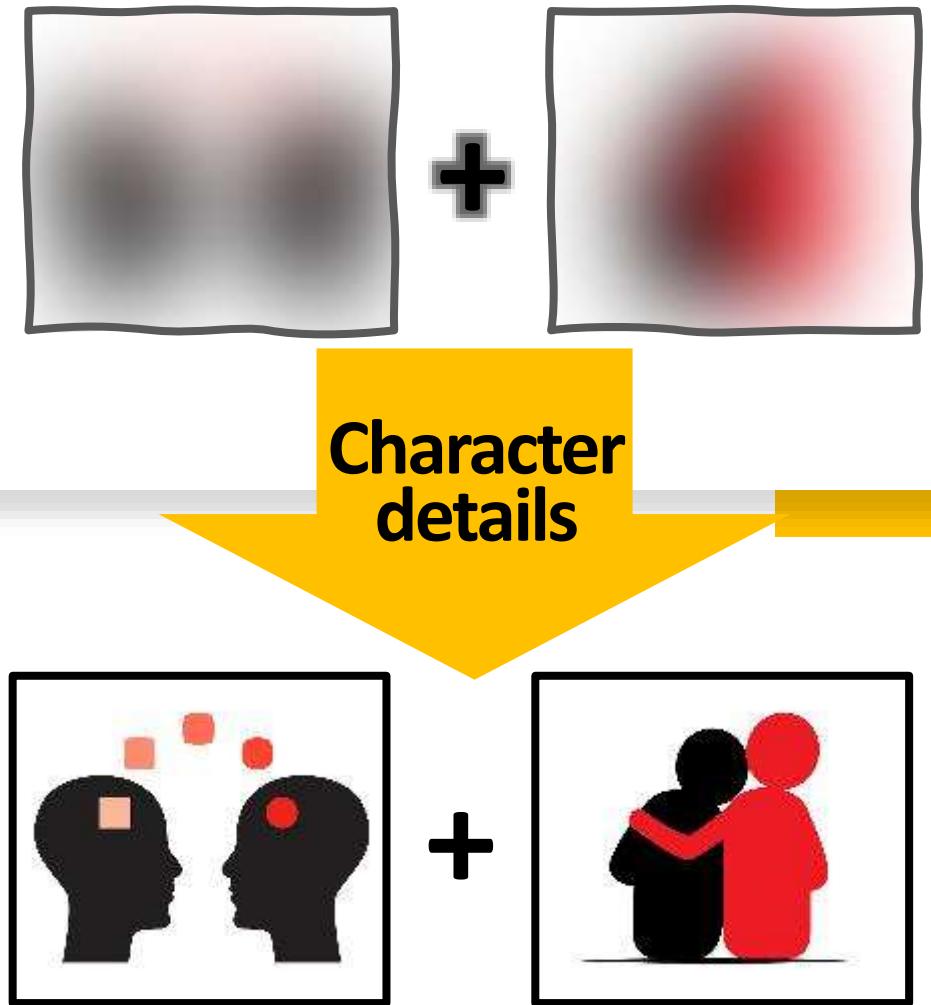
Deliver donor joy:
Help them build a portfolio of visible results reflecting their identity

“By engaging donors in exploring their philanthropic goals and charitable interests, planned giving staff can effectively help donors along their philanthropic journey ... This journey **enables a donor to give joyfully**—meaning that the donor is able to visualize the result of his or her philanthropy...”

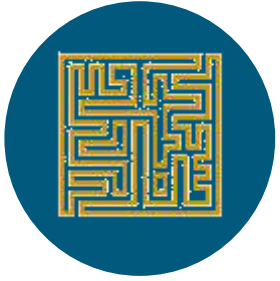
-Jackie Franey

WHY it works

- Adding child's name and picture doubled willingness to donate. Why?
- Character details → Mental Image → Victim-focused emotion (Sympathy) → Donation



Victory barriers: Complicated stories

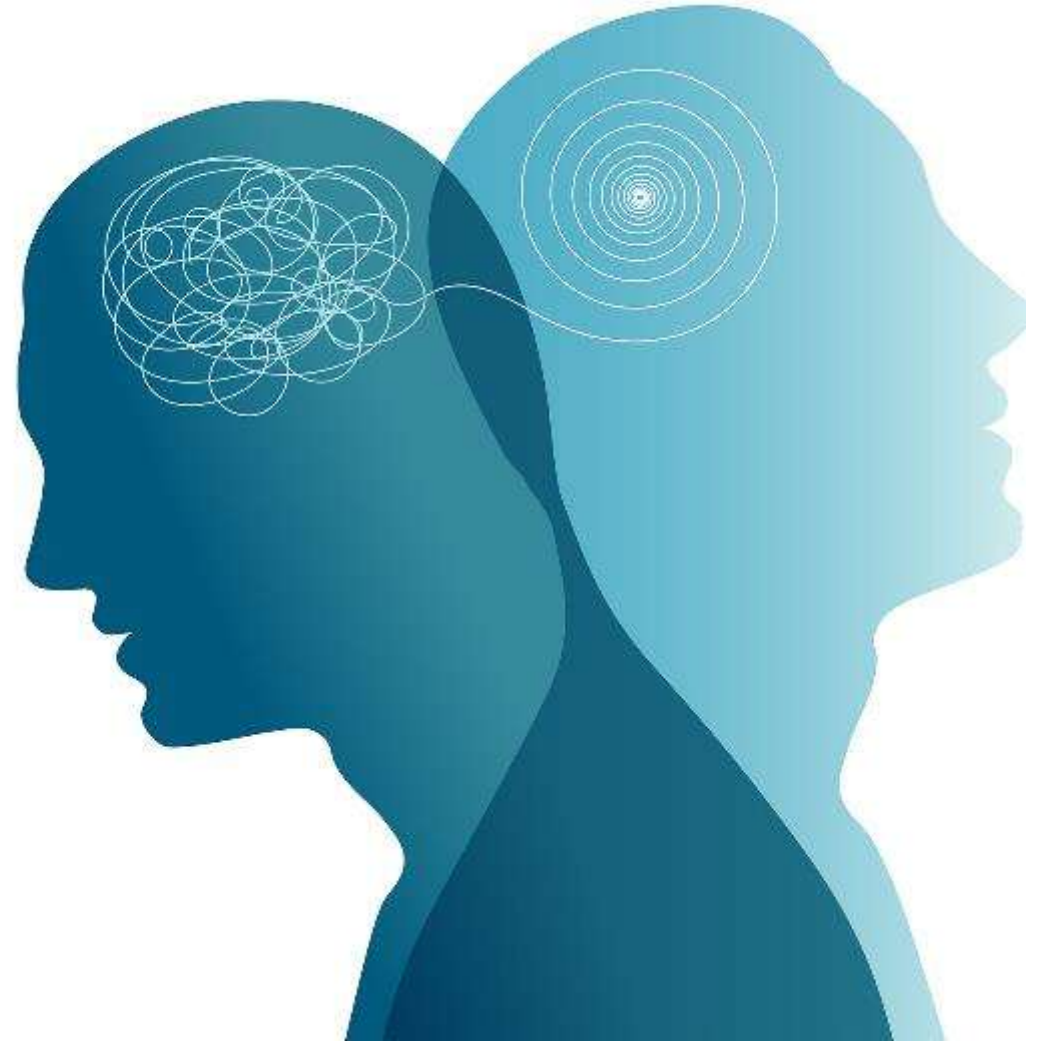


A complicated, technical explanation triggers the analytical, error-detection system



But a gift must first be motivated by clear images that evoke a social-emotional response

(Afterward, it's fine to make complexity available to confirm the social-emotional decision.)



Victory barriers research: Complexity kills giving

In experiments, increasing project details decreases donations because “Factual information about aid effectiveness that may be arduous to process, both with regard to content and length, might dampen the emotional reaction of donors”



Challenge
↗
Identity ← Victory

Complexity kills giving

Force-feeding facts changes a social-emotional story into a technical report.



Victory barriers research: Complexity kills major gifts



- In a study of major donors to an environmental charity, the charity's new 36-page plan shifted, "Its approach from land conservation to a more complex, systems-oriented approach"
- Technical experts? They approved this complex approach
- The donors? 85% expressed serious concerns

Victory barriers research: Complexity kills major gifts



The problem: “When compared with the tangibility of prior gifts, these measures seemed too intangible to feel confident funding ... At its core, the grander vision was too broad for any one individual donor to feel like they personally can make the sort of impact that matters.”



Victory barriers: Fuzzy victory

- Compelling story evokes a clear image: A clear link from a clear challenge to a clear victory
- A vague or uncertain victory won't work
- “What changes if I give?”



7.
**Deliver
donor joy:**
Help them
build a
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visible
results
reflecting
their identity

**Delivering donor joy is what the most
successful modern fundraisers do**

“Motivating donors does not mean
persuading donors to do something
that they don’t want to do or that is
not in their best interest. Motivating
donors comes through
understanding that philanthropy
brings joy to the donor and that if
the donor really believes in the
mission, motivation is simply a tool
to **bring about the donor’s wishes.**”

-Barbara L. Ciconte & Jeanne Gerda Jacob

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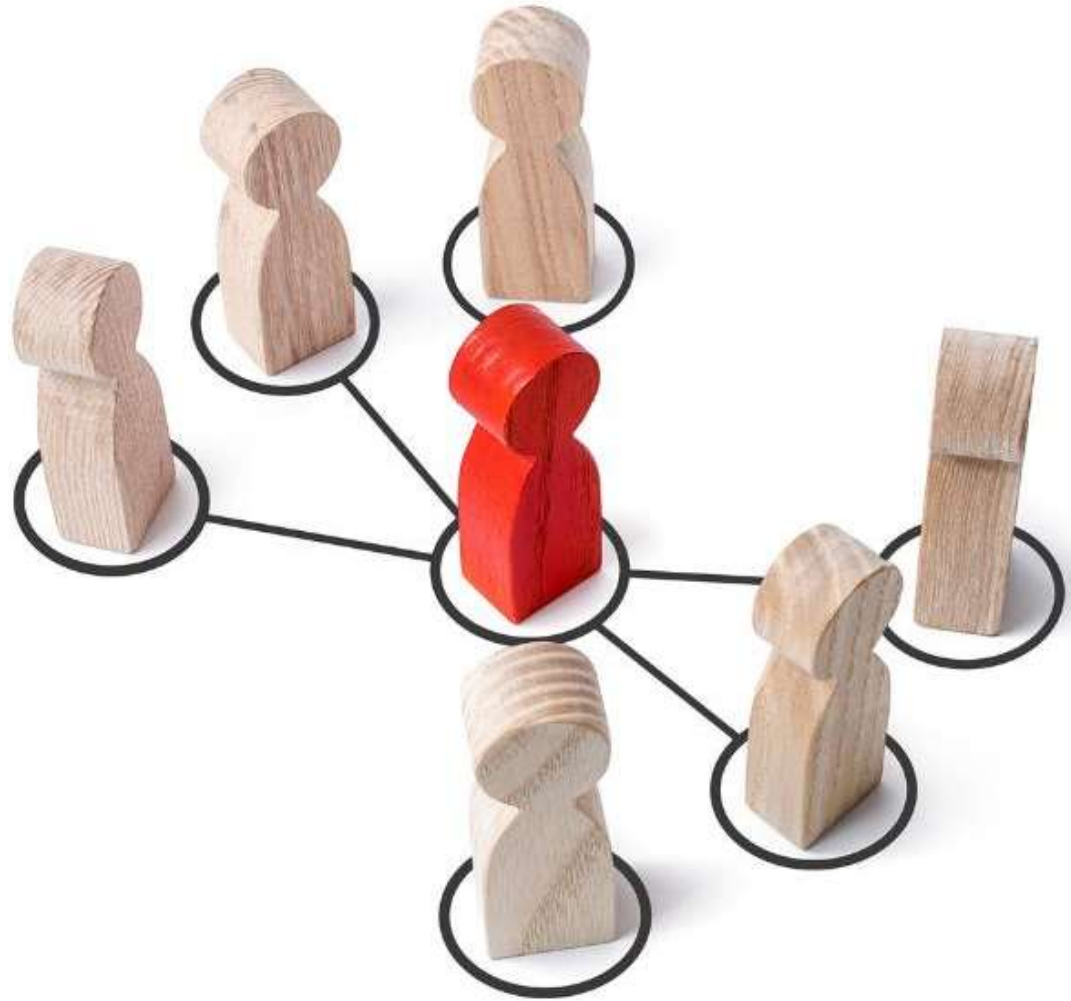
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10. Deliver donor joy: The identity-fulfillment donor journey brings the best life experience

Donor-Donor Community (Social Norms)

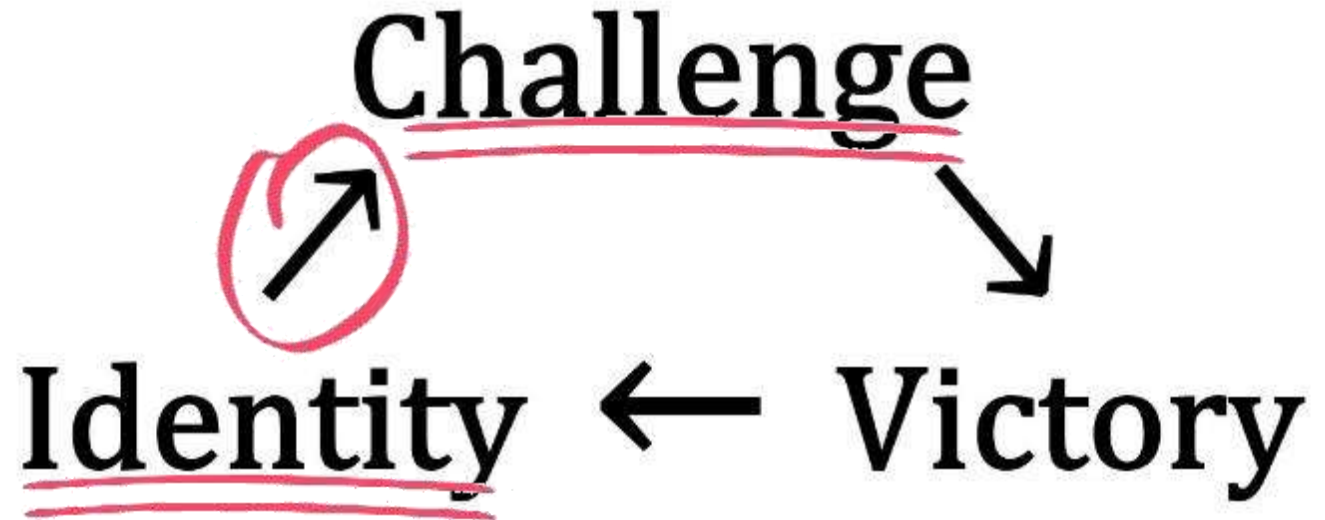


Theory: The monomyth



Showing that
“people like me
make gifts like
this,” links the
challenge with
the full cycle

Original identity →
Challenge



“People like me make
gifts like this”

- The group is a key source of identity
- If others like me accept a challenge, it links my original identity to the challenge

Challenge → Victory



“People like me make
gifts like this”

- They must believe their gift will make a difference
- They must believe in the hope of victory
- Thus, it's easier for me to believe the same

Victory → Enhanced Identity



“People like me make
gifts like this”

- The group is a key source of identity
- The victory likely benefits
 - My group
 - My standing in the group

The effective challenge is part of the full story cycle



- The effective challenge is rooted in the donor's original identity and promises a victory that delivers an enhanced identity
- Showing that "people like me make gifts like this" helps make these links



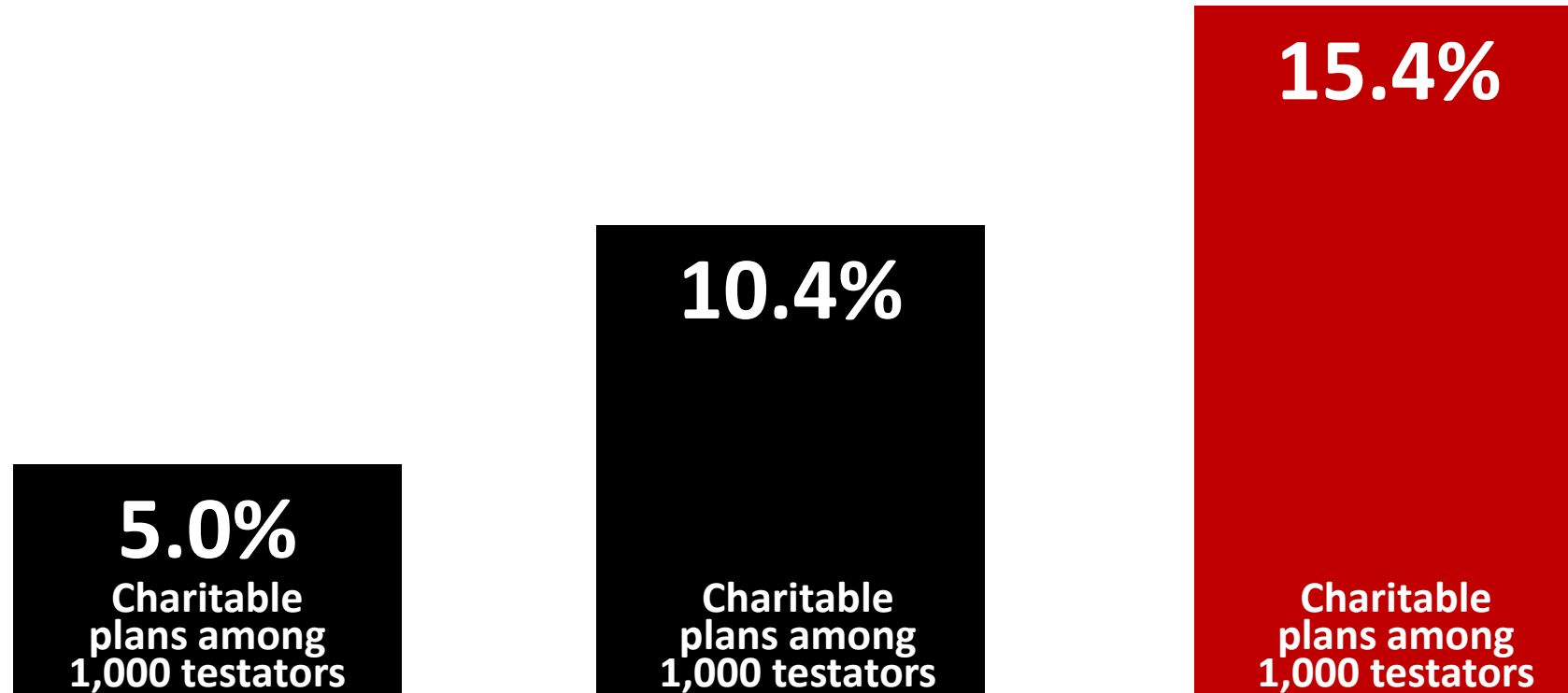
Experimental
results: Other
people

Others' examples influence

- Giving
- Volunteering
- Helping others

Cason, T. N., & Mui, V. L. (1998). Social influence in the sequential dictator game. *Journal of mathematical psychology*, 42(2-3), 248-265.; Frey, B. S., & Meier, S. (2004). Social comparisons and pro-social behavior: Testing "conditional cooperation" in a field experiment. *American Economic Review*, 94(5), 1717-1722; Chen, Y., Harper, F. M., Konstan, J., & Li, S. X. (2010). Social comparisons and contributions to online communities: A field experiment on movielens. *American Economic Review*, 100(4), 1358-98; Bryan, J. H., & Test, M. A. (1967). Models and helping: Naturalistic studies in aiding behavior. *Journal Of Personality and Social Psychology*, 6(4), 400-407.

Proportion including charity in their will documents

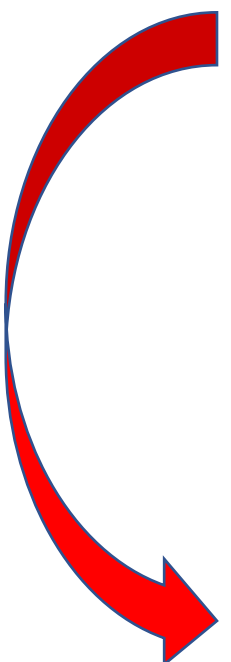


**No reference
to charity**

**Would you like
to leave any
money to
charity in your
will?**

**Many of our customers
like to leave money to
charity in their will. Are
there any causes you're
passionate about?**

What “you” would do or what another has done?



You make a gift and receive a tax deduction and yearly income for life. Any unused gift amount will go to the charity at the end of your life.

Gift Annuity

Interested Now
Definitely/somewhat/slightly

All: 33.5%
55+: 23.2%

Sara made a gift and received a tax deduction and yearly income for life. Any unused gift amount will go to the charity at the end of her life.

Gift Annuity

All: 38.6%
55+: 38.6%

Please rate your interest in pursuing the above described charitable giving arrangement



Examples from major gifts:
“People like me”

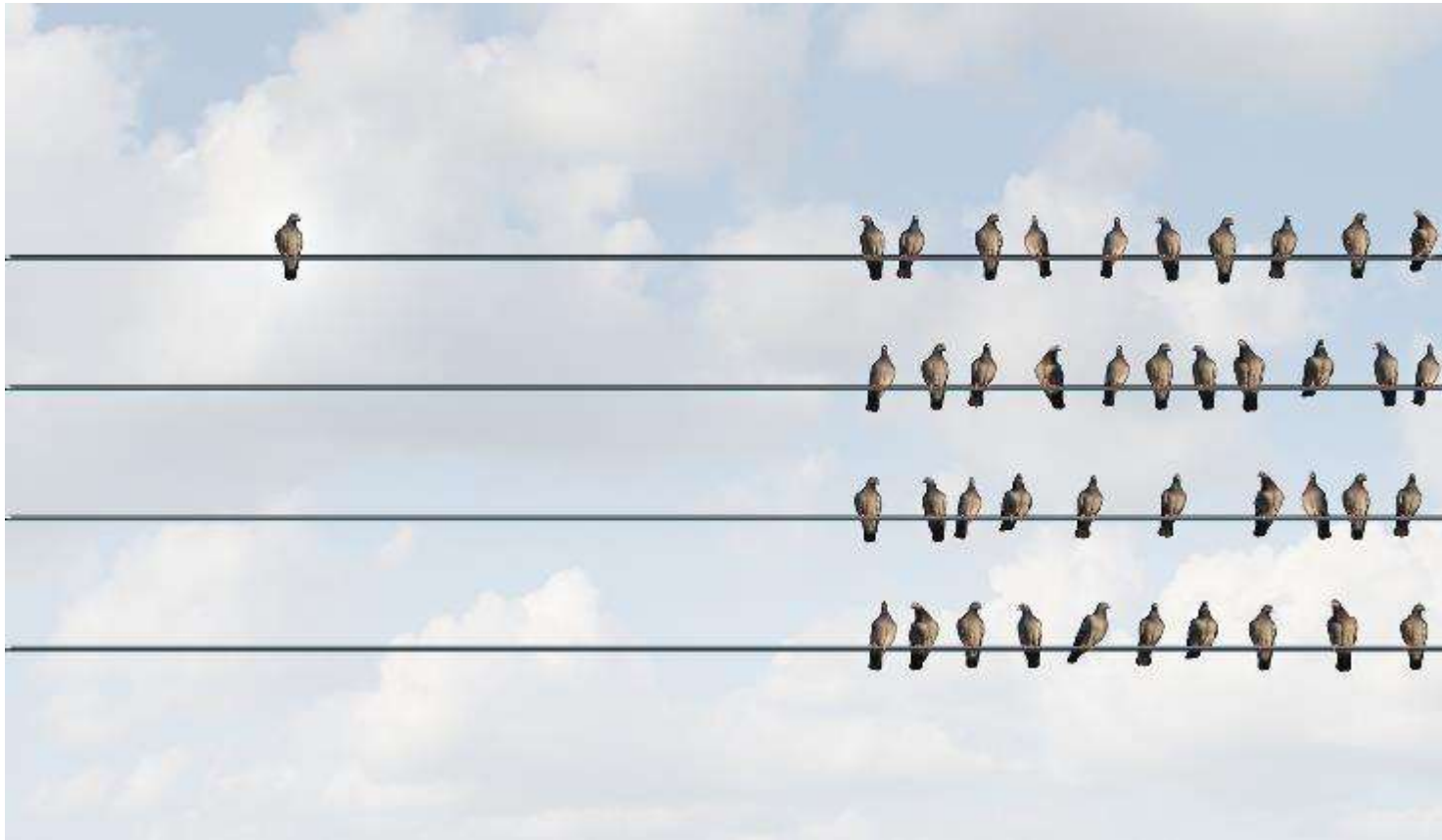
Josh Birkholz explains, “You need to be branded as the type of place that [other] ultra-high-net-worth donors give to. How do we do that? One of the key ways is to really go beyond just showing what your organization’s impact on the world is, but to actually demonstrate how specific donors have made a big impact on the world.”

Examples from major gifts: “People like me”

A study of ultra-high-net-worth donors found, “nearly 60% report collaborating with other funders”



Examples from major gifts: “People like me”



In his interviews with mega gift donors, Jerald Panas shares, “People enjoy being part of ‘the club,’ being associated with prominent men and women who are giving to the same cause,” he says. And my interviewing bears this out. Very few donors enjoy the independent route...”

But what if you don't
already have mega donors
to use as examples?



Claire Gaudiani
recommends using a
historical example:

She begins with a phrase
like, "You know, you
remind me of ..."

The donor responds,
"Who is that?"

Then, "Show how the
vision of a major donor
can transform an
institution (Mary Garrett
at Johns Hopkins) or an
entire city (Ken Dayton in
Minneapolis)"



Fundraising: Reframing publicity

In the monomyth, the hero's return results in public acclaim, but it's framed as a sacrifice. Fundraising can do the same.

"I understand public recognition can be uncomfortable for you. But we've found it sets a powerful example that influences others. Allowing us to share your story could inspire other gifts. Think of it like giving a second gift. It could really make a big difference."



Fundraising: Reframing publicity

“Thank you so much for bearing with me. One last thing – stories of generosity tend to encourage others to be more generous. It would be an honor to publicize your gift to inspire others. Would that be ok?”

-Jason J. Shuba
University of Illinois

Fundraising: The ending is vital to the next story

“Every time I got a new pledge, I added (after my ‘thank you!’) ‘Can I let other supporters of Wellesley know you’ll be supporting the Wellesley Scholarship Foundation?’ Not only did I get a yes, but I increased my chance of turning the pledge into a gift by letting the pledgor know that her gift would be public.”

-Anne Melvin

Melvin, A. T. (2014, October). *The art (and science) of persuasion*. [Paper presentation]. National Conference for Philanthropic Planning, Anaheim, CA. p. 9.





An audience increases giving

- In experiments, lowering visibility of the giving decision decreases donations
- More visibility equals more giving, even if the feeling of visibility comes only from a picture of watching eyes

Andreoni, J., & Petrie, R. (2004). Public goods experiments without confidentiality: A glimpse into fund-raising. *Journal of Public Economics*, 88(7-8), 1605-1623. See, e.g., Butera, L., Metcalfe, R., Morrison, W., & Taubinsky, D. (2019). *Measuring the welfare effects of shame and pride*. National Bureau of Economic Research Working Paper Series. No. 25637; Lavertu, L., Marder, B., Erz, A., & Angell, R. (2020). The extended warming effect of social media: Examining whether the cognition of online audiences offline drives prosocial behavior in 'real life'. *Computers in Human Behavior*, 110, 106389.; Bateson, M., Nettle, D. & Roberts, G. (2006). Cues of being watched enhance cooperation in a real-world setting. *Biology Letters*, 2, 412-414; Haley, K. J., & Fessler, D. M. T. (2005). Nobody's watching? Subtle cues affect generosity in an anonymous economic game. *Evolution and Human Behavior*, 26, 245-256.

A supportive audience increases giving even more

- In experiments, encouragement from others, including other donors, increases giving
- This is even more powerful when encouragement comes from group leaders, especially elected ones, or others with high-status



See, e.g., Levy, D. M., Padgitt, K., Peart, S. J., Houser, D., & Xiao, E. (2011). Leadership, cheap talk and really cheap talk. *Journal of Economic Behavior & Organization*, 77(1), 40-52.



The charity
can function
as a
major gifts
“greenhouse”

It can build the right
audience and
opportunities for
transformational,
heroic giving

Move from giving to sharing

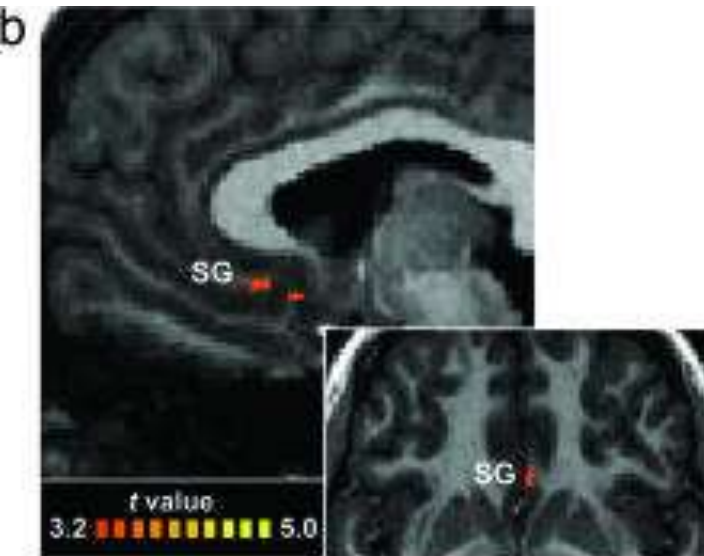
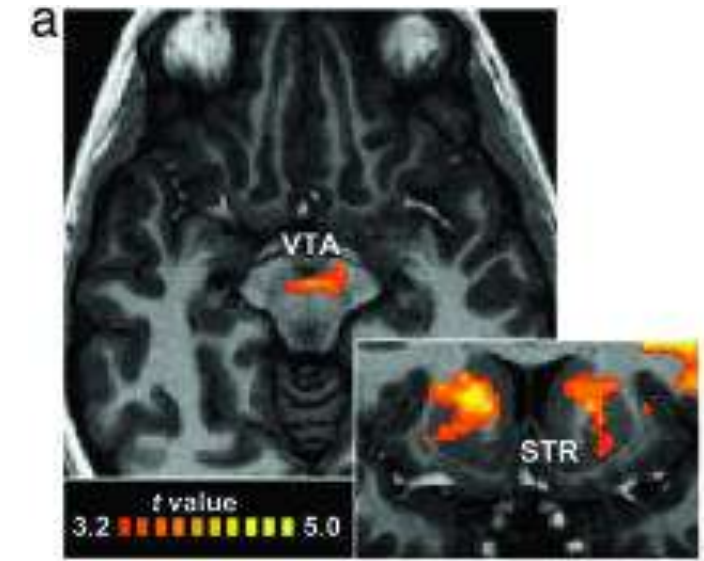


- Delivering practical value to a donor starts by building the right audience
- It starts by building a community

Donor- Recipient Organization Community



Philanthropy uses family bonding mechanisms



- Charitable giving is rewarding (like receiving money)
- But uniquely involves **oxytocin-rich** social attachment brain regions (used in maternal and romantic love)

“donating to societal causes recruited two types of reward systems: the VTA–striatum mesolimbic network, which also was involved in pure monetary rewards, and the subgenual area, which was specific for donations and plays key roles in social attachment and affiliative reward mechanisms in humans and other animals.” *Moll, et al (2006) PNAS 103(42), p. 156234.*

Philanthropy uses family bonding mechanisms



Increasing
neuropeptide
“**oxytocin**” – a family
bonding hormone –
increases giving

Philanthropy uses family bonding mechanisms

**Human touch,
when followed by a
small gift, elevated
oxytocin levels
AND subsequent
charitable giving**



Morhenn, V. B., Park, J. W., Piper, E., Zak, P. J. (2008). Monetary sacrifice among strangers is mediated by endogenous oxytocin release after physical contact. *Evolution and Human Behavior*, 29, 375-383.

Philanthropy is a “social act”

Charitable giving generated greater activation in brain reward centers (ventral striatum) when observers were present

Izuma, K., Saito, D. N., & Sadato, N. (2010). Processing of the Incentive for Social Approval in the Ventral Striatum during Charitable Donation. *Journal of Cognitive Neuroscience*, 22 (4), 621-631.

Build *family-social* relationships, not *market-contract* relationships

Do you **call**?
Do you **write**?
Do you **visit**?

Are you closer to
extended family
members who
do these things?





One study found that a distinguishing characteristic of successful fundraisers is that they tend to excel at friendship-related skills such as emotional intelligence or memory for personal details

A simple answer: What would a good friend do?

Q: Should I actually visit donors?

Q: Should I call?

Q: Should I write a personal note?

Q: It's so cheap to just spam the donor's inbox. Should I do that?



Describing the successful fundraisers behind America's first billion-dollar university fundraising campaign

They, “had to be ‘interesting well-read people’ so that donors would enjoy talking and relating to them, for fundraising is not primarily about ‘asking people for money’... It is the cultivation of people. It is developing relationships.”



Building charity friendship alliances takes time



- CASE suggests donor cultivation of 2 or 3 years before making a major gift request
- Naomi Levine writes, “When you sit down with someone and try to develop a relationship, you can’t just say, Oh, Mrs. Jones, would you give me \$100 million? That’s not the way it works. It’s a slow process. The quicker you ask, the less you get. Developing relationships and trust often takes a long time.”

Fundraising resolution

A positive philanthropic identity can come from two sources

1. The giving of the gift

“I am a generous, faithful, prosperous, or committed member of the community.”



2. The impact of the gift

“I am an effective, successful, victorious, or valuable member of the community.”



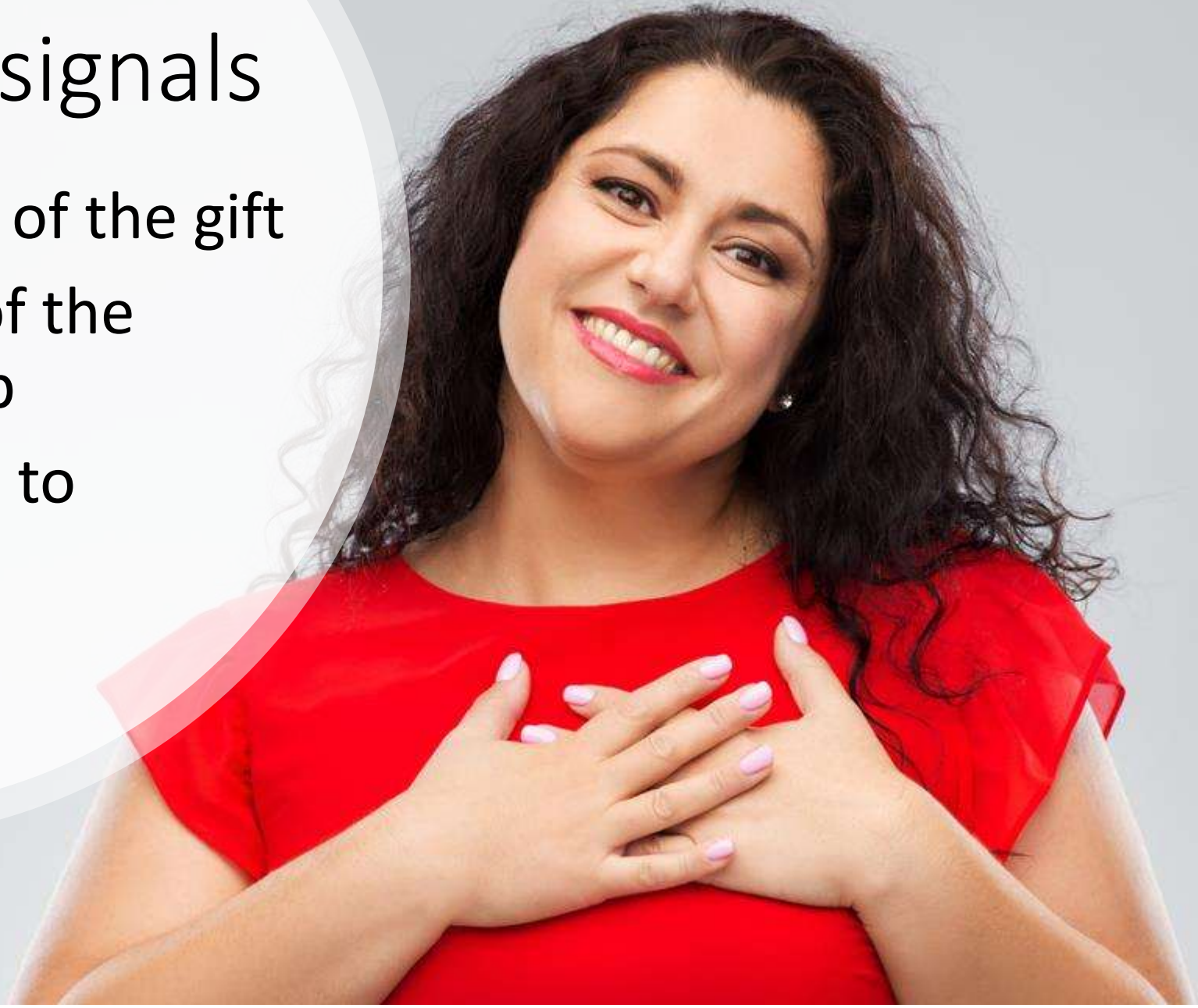
A study of lapsed donors: Why did you quit giving?

- “I feel that other causes are more deserving.” [Impact]
- They “did not acknowledge my support.” [Gratitude]
- They “did not inform me how my money had been used.” [Impact]



Gratitude signals

- The impact of the gift
- The value of the relationship
- Willingness to reciprocate



Experimental research

- Increasing impact works in donation experiments
- Expressing gratitude does, too
- Both work by supporting reciprocal social relationships



Gratitude encourages the next gift

- It delivers value to the donor
- It confirms a positive philanthropic identity
- Afterward, people's actions will tend to match this identity



Gratitude encourages the next gift: Research

One study examined 70,441 donations on a charitable crowdfunding platform, finding that a “successful donation result and ‘Thank-You’ feedback from fundraisers can significantly decrease [donors’] attrition rate.”



Xiao, S., & Yue, Q. (2021). The role you play, the life you have: Donor retention in online charitable crowdfunding platform. *Decision Support Systems*, 140, 113427.

Gratitude encourages the next gift: Research

- Gratitude also encourages fulfilling a gift pledge
- Another experiment found, “If expressions of gratitude are then targeted to individuals who select into pledges, reneging can be significantly reduced and contributions significantly increased”



Andreoni, J., & Serra-Garcia, M. (2021). The pledging puzzle: How can revocable promises increase charitable giving? *Management Science*, 67(10), 4969-6627.

Gratitude quality: Research

Adding this to the standard telephone “thank you” doubled the likelihood of later gifts:

“You went out of your way to support us, and we want you to know how much we appreciate you. Basically, we think you’re great.”

This specifically confirmed the donor’s positive identity.



You're an admirable person!

8.

**Deliver
donor joy:**
Build a
mutually
supportive
community
for donors

“Donors want to be appreciated as people,
not pocketbooks.”

Perry, G. (2007). *Fired-up fundraising: Turning board passion into action*. John Wiley & Sons. p. 84.

Great gratitude confirms the full donor-hero story



Original Identity → **Challenge** → **Victory** → **Enhanced Identity**

- Great gratitude includes gratitude for a gift (accepted a heroic challenge) and for an impact (won a heroic victory)
- It's not just transaction gratitude ("You did a good thing"), it's also relationship gratitude ("You are a good person")
- It's gratitude that confirms an enhanced identity



Delivering victory

Gift reporting, gratitude,
and compatible publicity
confirming the gift **as an
expression of the
internal moral value**
supports the victory

IDENTITY: Start with the donor's philanthropic identity

1. Find your people group: The wealth holders
2. Find their donor joy: Help them define a personally meaningful victory from their identity (personal values, life history, and social/family norms)

CHALLENGE: Deliver the heroic challenge

3. Talk wealth not income: Discuss the donor's past, present, and future asset story
4. Don't beg or bully: Walk alongside as a persistently helpful philanthropic wealth advisor
5. Make it feasible: Show their financial abundance to accept the heroic challenge

VICTORY: Help the donor experience a heroic victory

6. Deliver donor joy: Focus on the donor's impact, not the charity's
7. Deliver donor joy: Help them build a portfolio of visible results reflecting their identity

8. Deliver donor joy: Build a mutually supportive community for donors

9. Deliver donor joy: Serve as an instrument for their enduring impact
10. Deliver donor joy: The identity-fulfillment donor journey brings the best life experience

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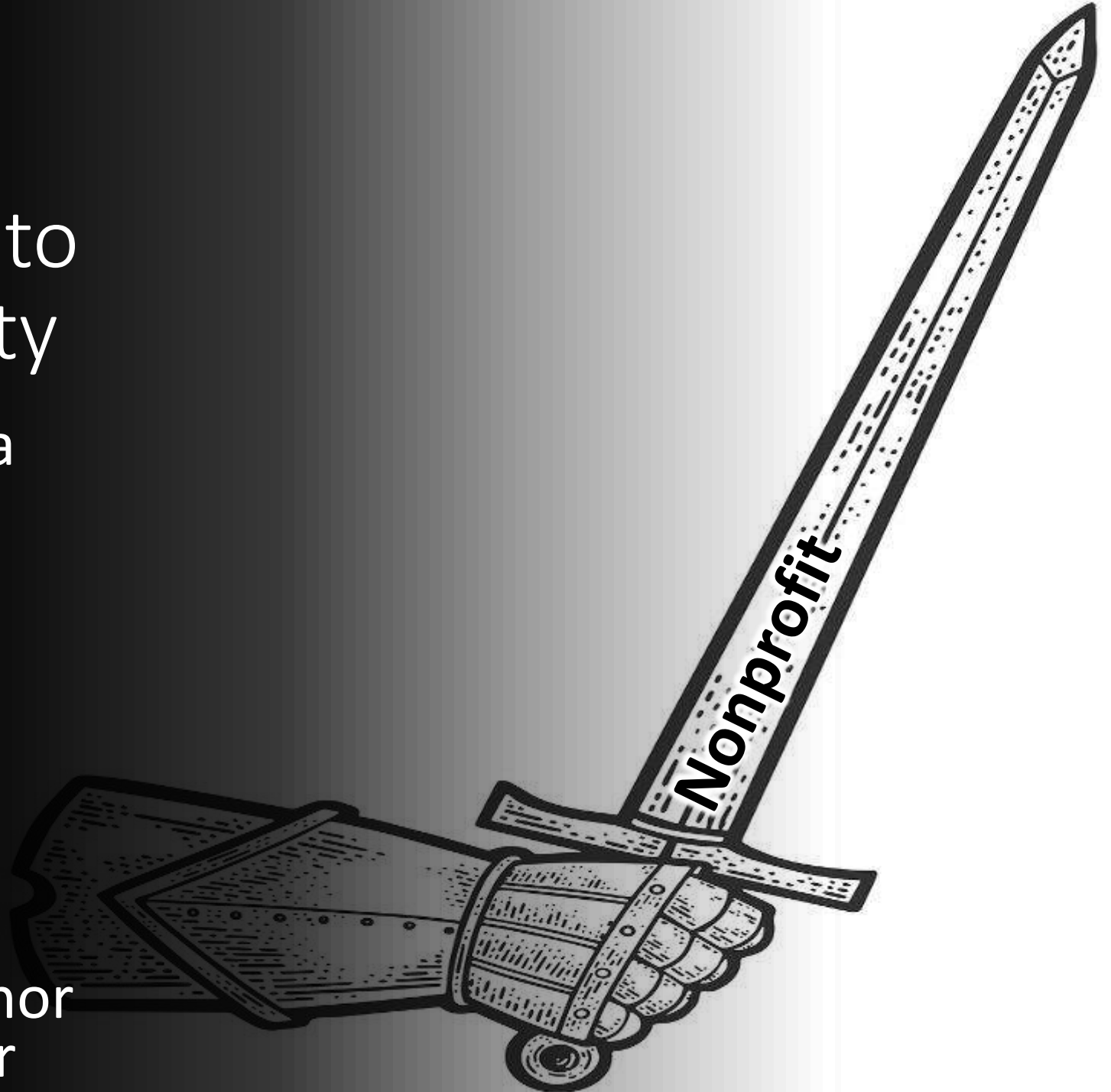
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Give permanence to the donor's identity

- A donor can't provide a college education, but through a nonprofit he can
- A donor can't advance cancer research, but through a nonprofit he can
- A nonprofit can do something else the donor can't: It can live forever



Death is a problem

The solution:
“symbolic
immortality” the
idea that some part
of one’s identity –
one’s values, story,
name, family, or
community – will
live on



Mortality and permanence in experiments

	Average Gift	
Charity Description	Normal Group	Death Reminded Group
“creating lasting improvements that would benefit people in the future”	\$100.00	\$235.71
“meeting the immediate needs of people”	\$257.77	\$80.97

- Mortality reminders increased giving if the charity was described as “creating lasting improvements”
- They decreased giving if the charity was described as “meeting the immediate needs of people”
- Adding permanence to a memorial scholarship fund also dramatically increased giving

Permanence is powerful in estate giving

- 78% of charitable bequest dollars (estates \$5MM+) went to private family foundations
- 35 of the wealthiest and oldest schools get over a quarter of estate gifts to education





As people age, mortality awareness and desire for lasting impact increases

- Major gifts often occur at older ages
- Permanence is important for these gifts
- They tend to go to large charities that hold large endowments and offer more permanence

Maxfield, M., et al. (2014). Increases in generative concern among older adults following reminders of mortality. *International Journal of Aging and Human Development*, 79(1), 1-21.; Coutts and Co. (2015) Coutts Million Pound Donors report



Legal theory recognizes
the power of permanence

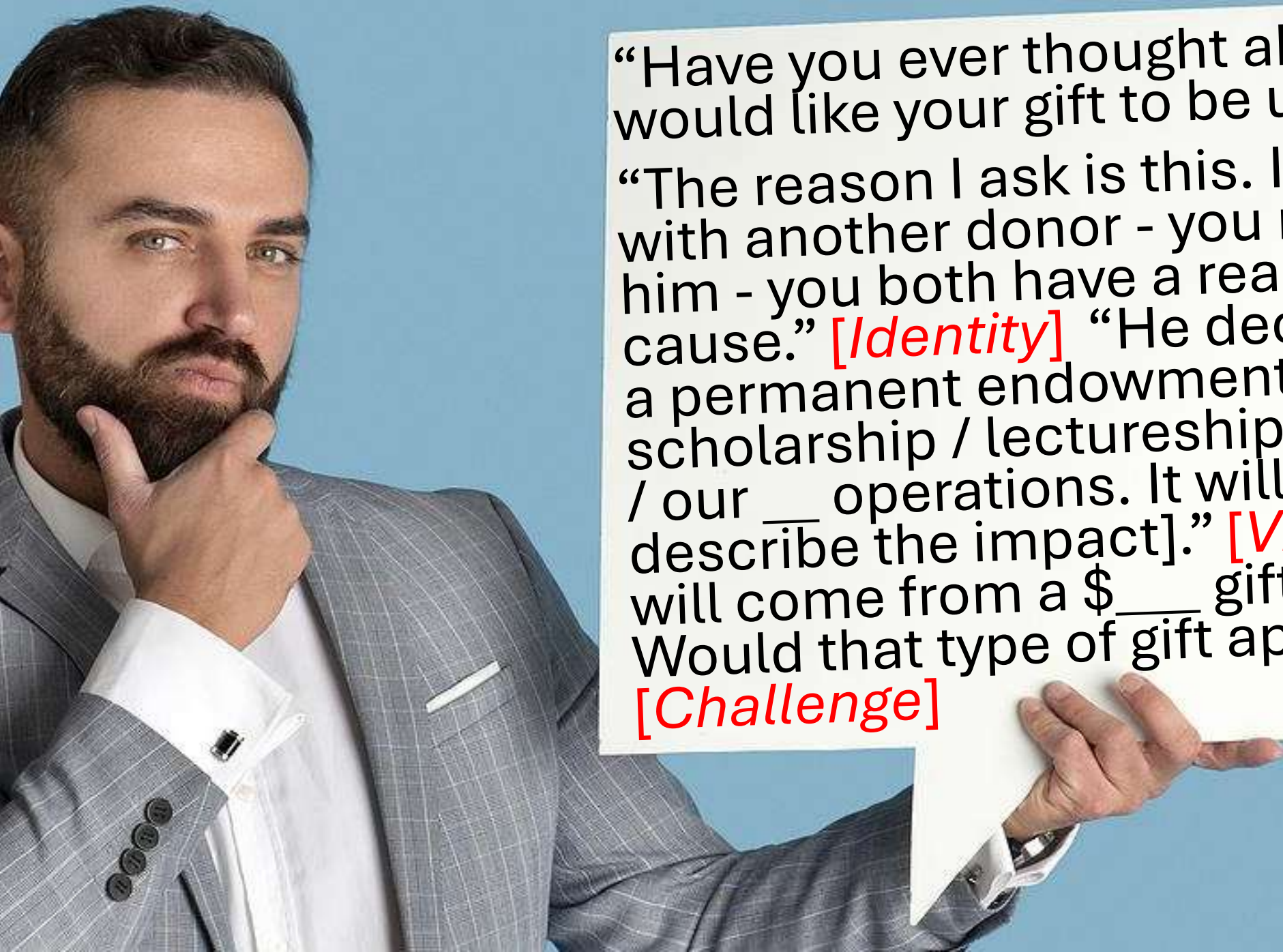
“Laws enforce perpetual funds for
charity because to do otherwise
would discourage gifts.”

-Professor Evelyn Brody

The magic follow-up question for escalating estate gifts

- “Have you ever thought about how you would like your gift to be used?”
- Share stories about planned gifts from another donor of a specific size (e.g., endowing a particular item)
- Permanence goals work well in estate experiments





“Have you ever thought about how you would like your gift to be used?”

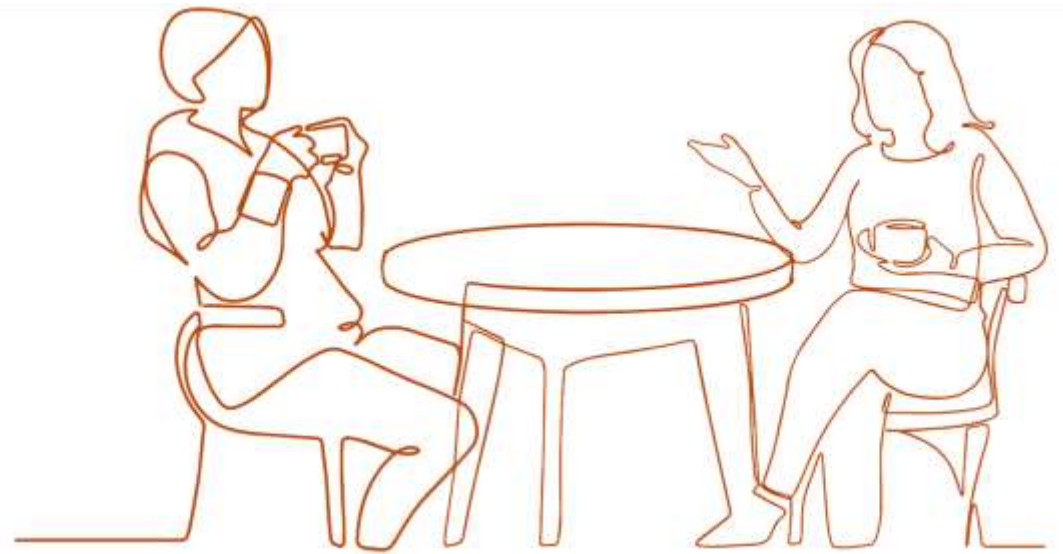
“The reason I ask is this. I was working with another donor - you remind me of him - you both have a real heart for this cause.” *[Identity]* “He decided to create a permanent endowment for a scholarship / lectureship / professorship / our ___ operations. It will ... [here describe the impact].” *[Victory]* “This will come from a \$___ gift in his will. Would that type of gift appeal to you?”
[Challenge]

Large estate gifts provide permanence and visualizable impact

- Making the gift more attractive and enjoyable in these ways also leads to higher gift retention.
- Moving towards endowment with visualizable impact then allows for the next step...

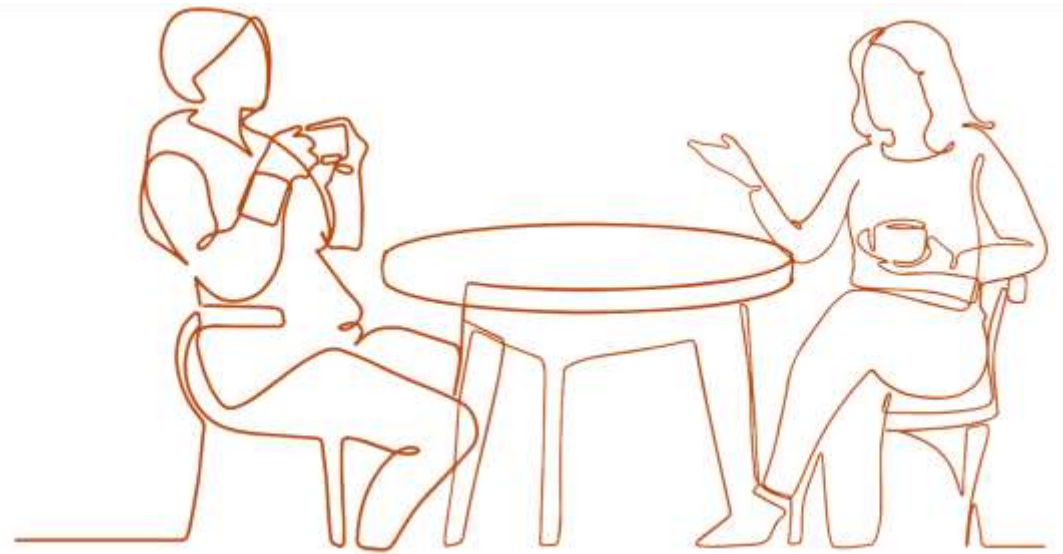


Conversations



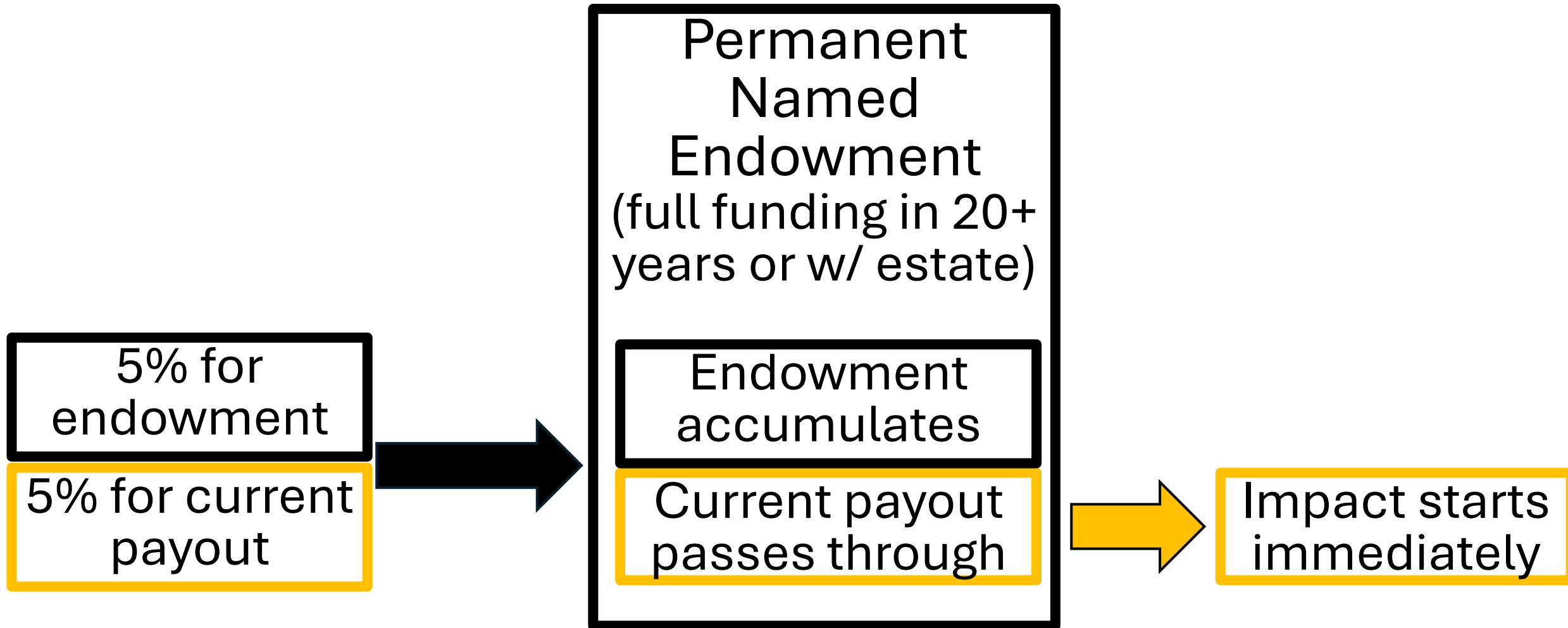
- “Thank you so much for including us in your plans. To treat us like a family member – that means so much!”
- “It’s great to think about the impact your permanent endowed *[cause area/scholarship/professorship]* will make over so many years!”
- “Would you ever consider starting that now so you could see the impact personally?”

Too much for an immediate gift?



“I understand. It’s a common circumstance. Many people in your situation have decided to start their permanent fund right away using our 5 & 5 plan [or “virtual endowment”]. Your permanent fund will pay out 5% per year. If you decide to make annual gifts of that 5% payout plus 5% to fund the endowment, you could start your permanent fund immediately. Because it’s backed up by your estate plan, your named fund will be permanent no matter what, but this way you can see the impact right away. Is that something you might consider?”

“Virtual” or “5&5” Endowment





The virtuous cycle

Making it a permanent endowment gift with specific, visualizable impact makes it attractive.

- This increases gift retention.

Making it a permanent endowment gift with specific, visualizable impact gives a reason for a larger gift.

- This increase gift size.

Making it a permanent endowment gift with specific, visualizable impact gives an attractive way to start it today through 5&5 or “virtual endowment” funding.

- This makes the gift right now.

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10. Deliver donor joy: The identity-fulfillment donor journey brings the best life experience

Consuming more stuff is fine.

**But it doesn't make an
inspirational story.**

Piling up more things
is nice.

**But it doesn't make
a meaningful
journey.**

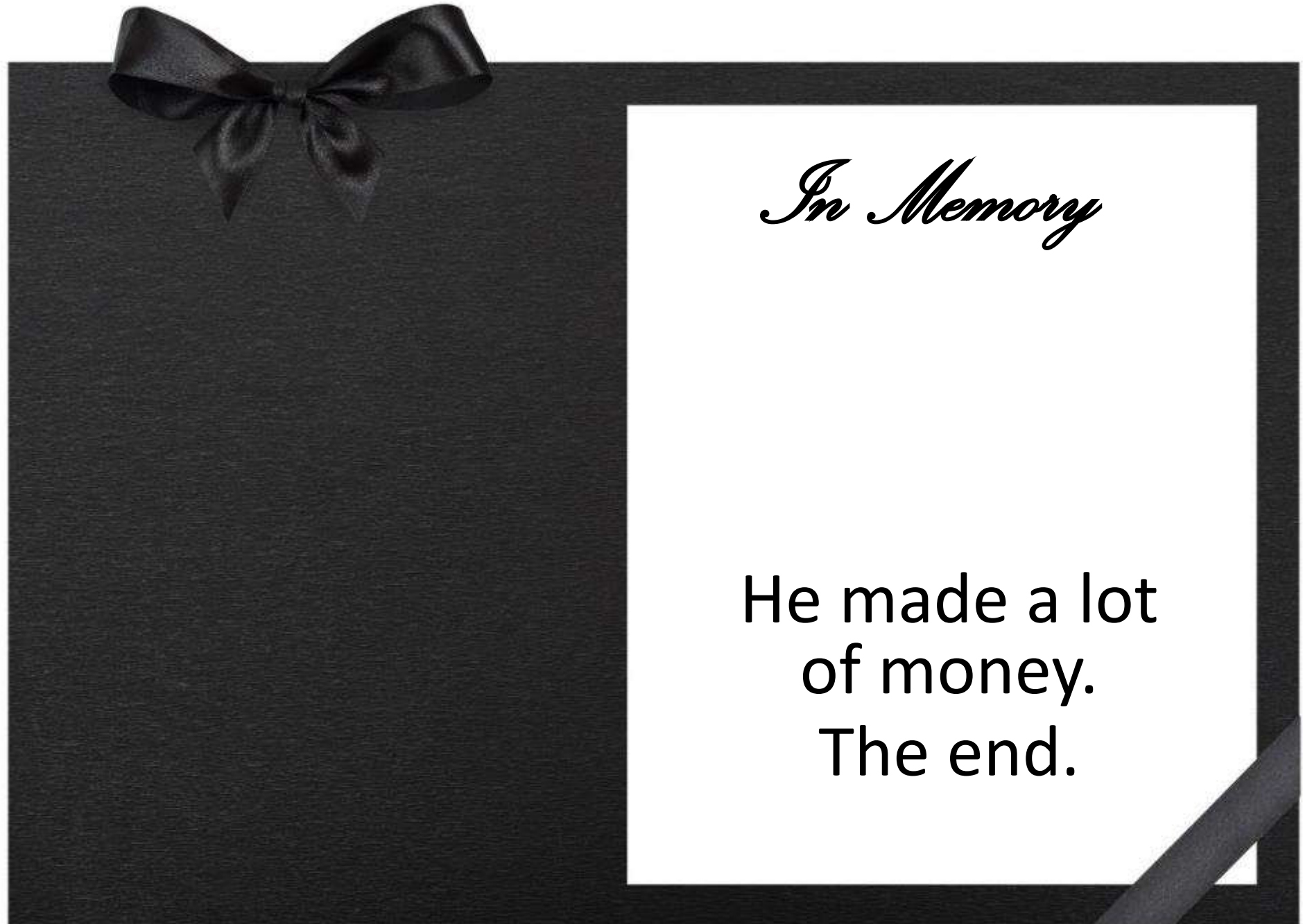




Spending money only on yourself is not noble. Its impact is temporary. It ends when you end.

No matter what you eat, wear, drive, or own, if your life is only about your own consumption, it's ultimately pretty meaningless.

No one
wants this as
an obituary



In Memory

He made a lot
of money.
The end.



The heroic donor

That's where philanthropy comes in

- Donors can support meaningful values that transcend their own lives
- Philanthropy allows donors to be heroic

Modern Fundraising Advice

10.

Deliver

donor joy:

The identity-
fulfillment
donor
journey
brings the
best life
experience

“You will experience the joy of enabling people to achieve their philanthropic goals and dreams... Motivating donors comes through understanding that philanthropy brings joy to the donor and that if the donor really believes in the mission, motivation is simply a tool to bring about the donor’s wishes.”

Lysakowski, L. (2010). *Fundraising as a career: What, are you crazy?* CharityChannel Press. Foreword; p. 28.

Delivering donor joy is what the most successful modern fundraisers do

10.

Deliver

donor joy:

The identity-
fulfillment
donor
journey
brings the
best life
experience

“This whole major gifts thing is not about the money. It is about **bringing joy and fulfillment to donors.**”

-Jeff Schreifels

Delivering donor joy is what the most successful modern fundraisers do

10.

**Deliver
donor joy:**
The identity-
fulfillment
donor
journey
brings the
best life
experience

“Fundraising is the gentle art of
teaching **the joy of giving!**”

-Hank Rosso
Founder of the School of Philanthropy at
Indiana University

Delivering donor joy is what the most successful modern fundraisers do

10.

Deliver donor joy:
The identity-fulfillment donor journey brings the best life experience

“I like raising money. I like everything about it ... Helping a successful executive find new meaning and joy in life from a charitable gift.”

-Ren Levy

Delivering donor joy is what the most successful modern fundraisers do

10.

**Deliver
donor joy:**
The identity-
fulfillment
donor
journey
brings the
best life
experience

“Take the time to reflect on the gifts you helped close that made you feel good, and the joy that donors felt in making those gifts.”

-Scott Janney

10.

**Deliver
donor joy:**
The identity-
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best life
experience

**Delivering donor joy is what the most
successful modern fundraisers do**

“They have the opportunity to
learn to give through you ... You
are **helping them experience the
joys of giving.**”

-Scott Morton

Delivering donor joy at cultivation

10.

**Deliver
donor joy:**

The identity-
fulfillment
donor
journey
brings the
best life
experience

“redefine the fundraising cycle of cultivation as ‘creating **the joyful giver,**’”

-Marcy Heim

Delivering donor joy at the ask

10.

**Deliver
donor joy:**

The identity-
fulfillment
donor
journey
brings the
best life
experience

“In your mind’s eye, sit with the donor and propose what you’ve come up with as a place he can help. Is he thrilled? Has he found **fulfillment and joy**? If not, start over.”

-Richard Perry
& Jeff Schreifels

Delivering donor joy in post-gift stewardship

10.

Deliver donor joy:
The identity-fulfillment donor journey brings the best life experience

One book describes its best “stewardship technique” as
“Bring the person to the organization ... **let them ‘experience’ the joys and benefits of their gift** or investment.”

-Laura Fredricks

Delivering donor joy in newsletters

10.

**Deliver
donor joy:**

The identity-
fulfillment
donor
journey
brings the
best life
experience

“A properly prepared donor newsletter will add heaps to your bottom line, **bring a tsunami of joy to your donors**, and boost the lifetime value and retention rates of your organization’s donors to new heights.”

- Roger Craver

Delivering donor joy in estate gifts

10.

**Deliver
donor joy:**
The identity-
fulfillment
donor
journey
brings the
best life
experience

“A legacy gift **offers people real joy**; nobody would leave a legacy if it did not.”

-Steven Pidgeon

Delivering donor joy in giant gifts

10.

**Deliver
donor joy:**

The identity-
fulfillment
donor
journey
brings the
best life
experience

“In all cases of which I am familiar, million-dollar gifts were the result of a deep belief in the cause, long involvement of the donor with the organization, and **a feeling of satisfaction and joy on the part of the donor.**”

-Gene Tempel

Delivering donor joy in giant gifts

10.

**Deliver
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The identity-
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“it was a persistent theme dominating nearly every interview. It was true with every single [mega-million-dollar] donor. It dealt with the **joy of giving**, the sheer **ecstasy**... A recurring pattern was the towering **gratification** they received from making the gift.”

-Jerold Panas

Ancient wisdom on donor joy

10.

**Deliver
donor joy:**

The identity-
fulfillment
donor
journey
brings the
best life
experience

In the 4th century, John Chrysostom called charitable giving “the foundation of health, the abundance of light and the origin of joyfulness.”

Chrysostom, J. (1862). Homily 64.5 in Matthew. In Migne, J. P., (Ed.), *Patrologia Graeca*. Volume 58:615. p. 48-49. Translation from Bae, J. (2018). *John Chrysostom: On almsgiving and the therapy of the soul* (Doctoral dissertation). Australian Catholic University. p. 68

Scientific research on donor joy

10.

**Deliver
donor joy:**

The identity-
fulfillment
donor
journey
brings the
best life
experience

“The more generous Americans are, the more happiness, health, and purpose in life they enjoy.”

-Professor Christian Smith
and Hilary Davidson

Scientific research on donor joy

10.

**Deliver
donor joy:**
The identity-
fulfillment
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best life
experience

“happier people give more and
giving makes people happier.”

-Professors Lalin Anik, Lara Aknin,
Michael Norton & Elizabeth Dunn

Anik, L., Aknin, L. B., Norton, M. I., & Dunn, E. W. (2015). Feeling good about giving: The benefits (and costs) of self-interested charitable giving. In D. M. Oppenheimer & C. Y. Olivola (Eds.), *The science of giving: Experimental approaches to the study of charity* (pp. 3-14). Routledge. p. 11.

Scientific research on donor joy

10.

**Deliver
donor joy:**
The identity-
fulfillment
donor
journey
brings the
best life
experience

“the Give Little group had significantly higher anger and hostility measures, lower forgiveness levels, and poorer stress coping strategies than the Give Much group. The Give Much group generally had baseline and stress response indices that were more consistent with good health than the Give Little group.”

-Dr. Joseph Neumann &
Professor David Chi

Neumann, J. K., & Chi, D. S. (1999). Relationship of church giving to immunological and TxPA stress response. *Journal of Psychology and Theology*, 27(1), 43-51.

Scientific research on donor joy

10.

**Deliver
donor joy:**

The identity-
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brings the
best life
experience

“When fundraisers help givers give, they may not realize that they are bringing these givers more happiness and better health.”

-Prof. Sara Konrath

IDENTITY: Start with the donor's philanthropic identity

1. Find your people group: The wealth holders
2. Find their donor joy: Help them define a personally meaningful victory from their identity (personal values, life history, and social/family norms)

CHALLENGE: Deliver the heroic challenge

3. Talk wealth not income: Discuss the donor's past, present, and future asset story
4. Don't beg or bully: Walk alongside as a persistently helpful philanthropic wealth advisor
5. Make it feasible: Show their financial abundance to accept the heroic challenge

VICTORY: Help the donor experience a heroic victory

6. Deliver donor joy: Focus on the donor's impact, not the charity's
7. Deliver donor joy: Help them build a portfolio of visible results reflecting their identity
8. Deliver donor joy: Build a mutually supportive community for donors
9. Deliver donor joy: Serve as an instrument for their enduring impact

10. Deliver donor joy: The identity-fulfillment donor journey brings the best life experience

10 Moves That Unlock Major Gifts

IDENTITY: Start with the donor's philanthropic identity

1. Find your people group: The wealth holders
2. Find their donor joy: Help them define a personally meaningful philanthropic identity (personal values, life history, and social responsibility)

CHALLENGE: Don't let the donor's identity

3. Talk wealth: Help them understand the power of their wealth
4. Don't beg: Help them understand the power of their wealth
5. Make it feel like a challenge: Help them understand the power of their wealth

VICTORY: Help the donor experience a heroic victory

6. Deliver donor joy: Focus on the donor's impact, not the charity's
7. Deliver donor joy: Help them build a portfolio of visible results reflecting their identity
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It's YOUR move!
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www.EncourageGenerosity.com
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Instruct **those
who are
rich in this
present
world** not to be
conceited or to set their
hope on the uncertainty
of riches, but on God,
who richly supplies us
with all things for
enjoyment: to do good,
to be rich in good
works, to **be generous
and ready to share**,
storing up for
themselves the treasure
of a good foundation
for the future, so that
they may take hold of
that which is truly life.

The “offensive” ministry

THE PEOPLE GROUP

- Paul directs Timothy to have a special ministry of generosity **focused on the wealth holders**. (1 Timothy 6:17-19). (This is NOT high income. It's for the accumulators.)
- It pulls the rich **into** community [*koinōnía*] through their sharing [*koinōnikoús*].
- It matches James who warns against **breaking** community [*diakrínō*] based on wealth. (James 2:2-4): “Make distinctions,” literally, “to separate throughout or wholly”