

Making the perfect fundraising ask

Lessons from Obi-Wan, Gandalf, and Morpheus

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Let's go to the movies!



What will we see?
If it's a blockbuster, we'll often see a similar underlying story. It's called the hero's journey: a universal story found across cultures, lands, and times.

Universal challenge: The “Call to Adventure”



The prospective hero must choose:

- Stay in his small, self-focused, ordinary world, or
- Go on a costly adventure to impact the larger world

The journey requires sacrifice, but there is a hope of victory

A guiding sage will help the hero, introducing friends, allies, and magical instruments

Ultimately, the hero will prevail



He will return victorious, bringing a gift to enhance his original world

Through the journey, his original identity will become a new, enhanced identity

- Externally, he will be honored
- Internally, he will be transformed

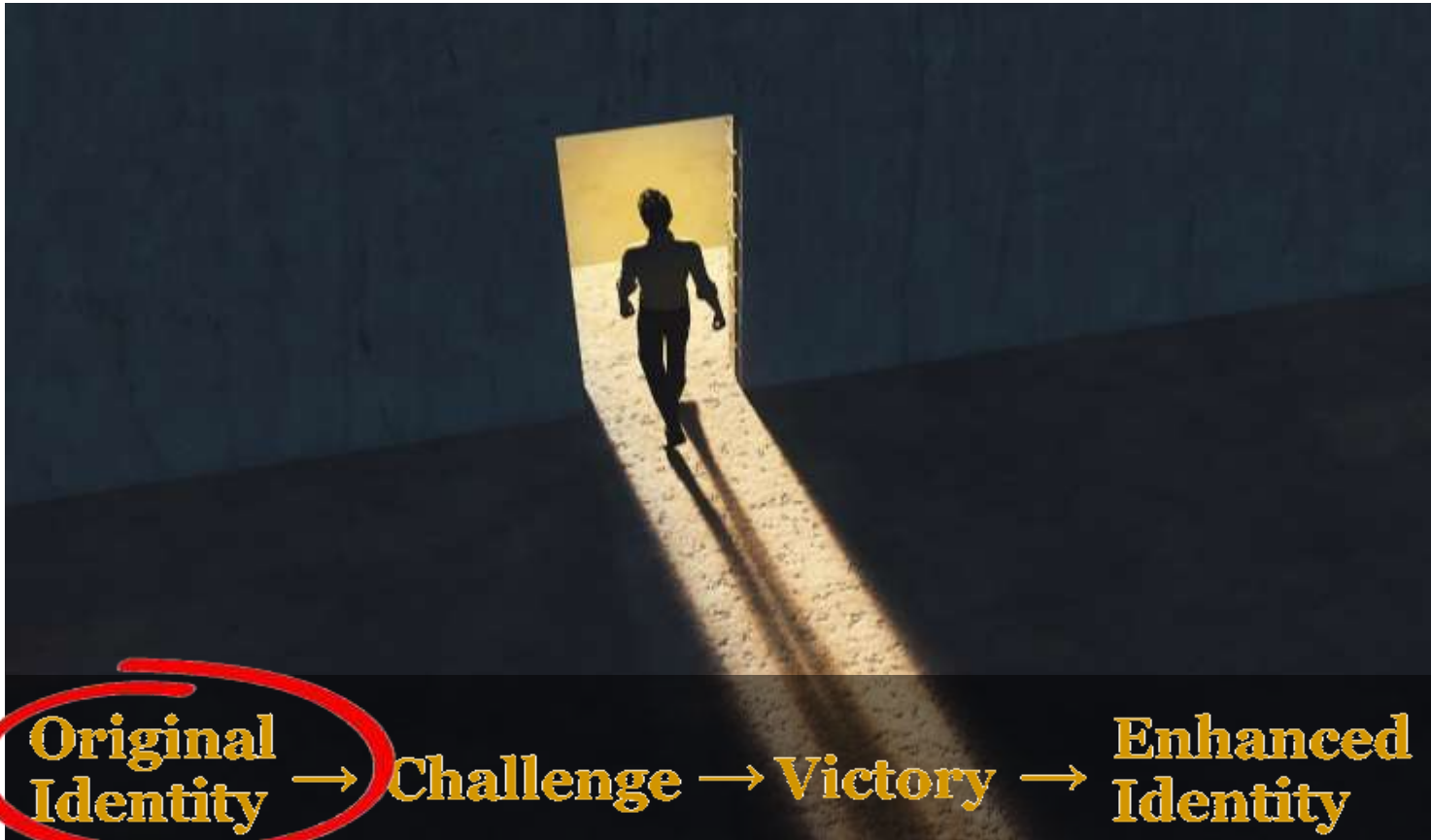


Original Identity → **Challenge** → **Victory** → **Enhanced Identity**

Universal steps: Identity,
challenge, victory

“A hero ventures forth from the world of common day into a region of supernatural wonder: fabulous forces are there encountered and a decisive victory is won: the hero comes back from this mysterious adventure with the power to bestow boons on his fellow man.”

-Joseph Campbell



Universal steps: Identity,
challenge, victory

"A hero ventures forth from the world of common day into a region of supernatural wonder: fabulous forces are there encountered and a decisive victory is won: the hero comes back from this mysterious adventure with the power to bestow boons on his fellow man."

The journey starts in the ordinary world, the source of the hero's original identity defined by his people, values, and life story.



"A hero ventures forth from the world of common day into a region of supernatural wonder: fabulous forces are there encountered and a decisive victory is won: the hero comes back from this mysterious adventure with the power to bestow boons on his fellow man."

Universal steps: Identity,
challenge, victory

The decision to venture forth into a new world is the challenge.



Universal steps: Identity,
challenge, victory

“A hero ventures forth from the world of common day into a region of supernatural wonder: fabulous forces are there encountered and a decisive victory is won: the hero comes back from this mysterious adventure with the power to bestow boons on his fellow man.”

Accepting this challenge ultimately results in a victory.



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

Universal steps: Identity,
challenge, victory

"A hero ventures forth from the world of common day into a region of supernatural wonder: fabulous forces are there encountered and a decisive victory is won: the hero comes back from this mysterious adventure with the power to bestow boons on his fellow man."

The hero returns with a gift to improve his original world. The journey enhances that world (the source of his people, values, and life story) and his standing within it (public honor / private transformation).

The fundraising challenge



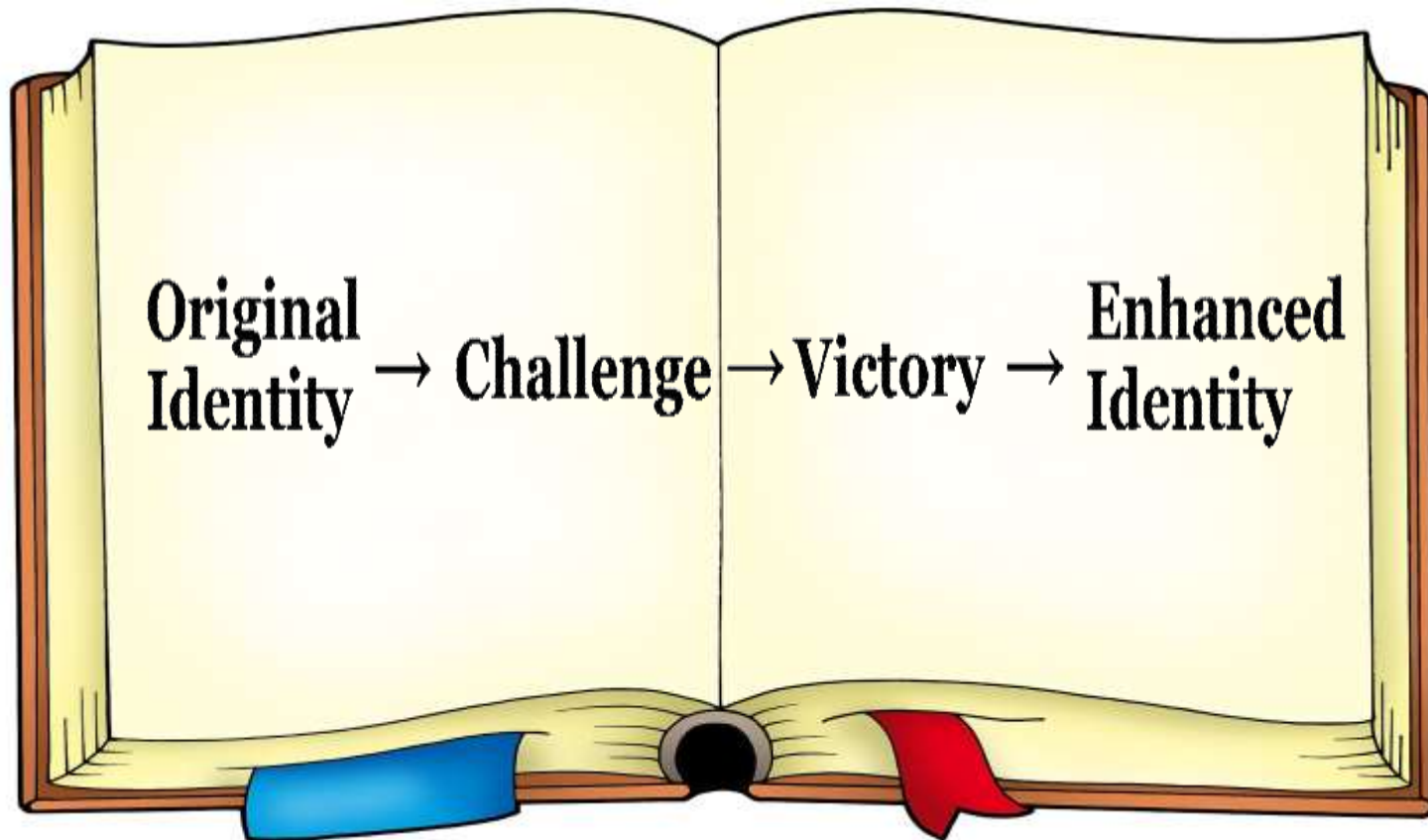
- In fundraising, advancing the donor's hero story is powerful
- As in every hero story, the journey is launched with a challenge

The fundraising “call to adventure” presents a choice



- Stay in the small, self-focused, ordinary world of personal consumption, or
- Go on a costly adventure to impact the larger world

The heroic fundraising ask includes each story element

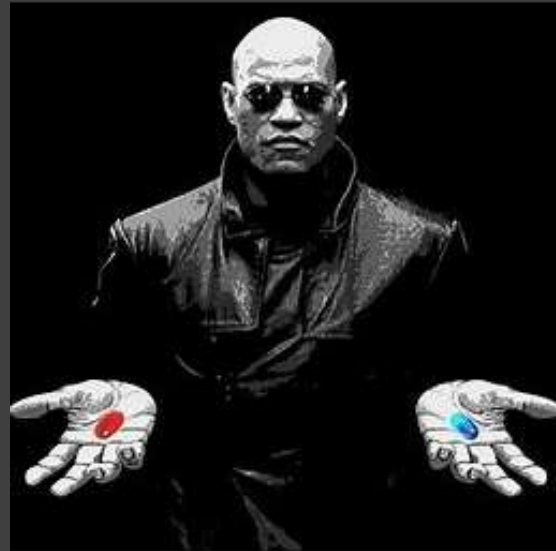


(1) The donor's original identity (from his people, values, or life story) will inspire accepting the challenge

(2) It will be a heroic (costly/sacrificial) challenge

(3) The challenge will promise a victory

(4) The promised victory will enhance the donor's identity (i.e., protect people or values linked to his identity, improve his external or internal reputation)



Let's go to the movies!

Star Wars, The Hobbit, and The Matrix – the highest grossing movie franchises of their times – are all classic monomyth stories. The guiding sage delivers the “call to adventure”:

Leave behind your small, self-focused, ordinary world!

Go on a costly adventure to make an impact for good in the larger world!

The guiding sage's identity message:
Take this challenge because of who you are!

your people your values your life story



**Original
Identity**



Challenge



Victory



**Enhanced
Identity**

“Call to
adventure”

- The challenge is a big ask
- It's a clear, yes-or-no choice
- It promises the hope of victory

Star Wars “call to adventure”: Identity

- Identity comes from one’s life story, people, and values
- The call begins with the prospective hero’s life story and people





Star Wars “call to adventure”: Identity (life story - people)

LUKE: How did my father die?

OBI-WAN: A young Jedi named Darth Vader, who was a pupil of mine until he turned to evil, helped the Empire hunt down and destroy the Jedi Knights. He betrayed and murdered your father. Now the Jedi are all but extinct.



Star Wars “call to adventure”:
Identity (life story - values)

OBI-WAN: Vader was seduced by the dark side of the Force. LUKE: The Force?

OBI-WAN: Well, the Force is what gives a Jedi his power. It's an energy field created by all living things. It surrounds us and penetrates us. It binds the galaxy together.



Star Wars “call to
adventure”:
Challenge with the
promise of victory

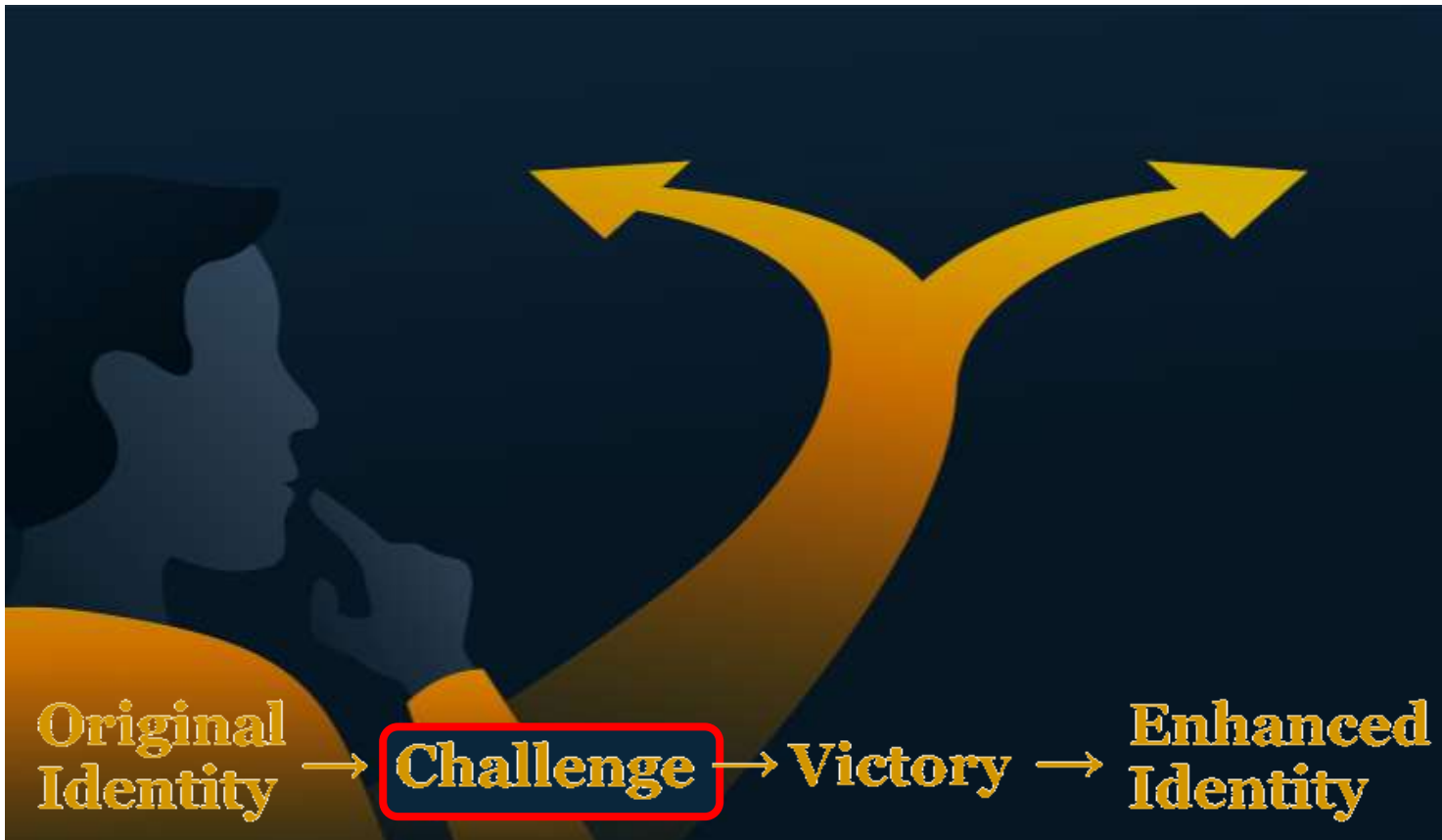
LEIA: I have placed information vital to the survival of the Rebellion into the memory systems of this R2 unit ... You must see this droid safely delivered to him on Alderaan. This is our most desperate hour. Help me, Obi-Wan Kenobi, you're my only hope.



Star Wars “call to
adventure”:
Challenge with the
promise of victory

OBI-WAN: You must learn the ways of the Force if you're to come with me to Alderaan.
LUKE: Alderaan? I'm not going to Alderaan. I've got to go home. It's late, I'm in for it as it is.
OBI-WAN: I need your help, Luke. She needs your help.

Star Wars “call to adventure”



The challenge is immediate and clear:

- Leave behind the small, self-focused world of farming
- Make an impact for good in the larger world

It is a stark “yes” or “no” decision

It is urgent

The crisis/opportunity is now

The challenge links with Luke's identity

his people



his values



his life story



Star Wars
“call to
adventure”

**Original
Identity**

→ **Challenge**

→ **Victory**

→ **Enhanced
Identity**

The challenge promises a victory – saving the rebellion – that links back to:

his people

his values

his life story



Original
Identity

→ Challenge

→ Victory

Enhanced
Identity

Star Wars “call to adventure”

The rebellion
fights against his
father’s murderer
(people) and the
dark side (values)

The promised
victory is
personally
meaningful
because of who
he is and who he
will become

Star Wars “call to adventure”: Identity motivates a “Yes”

- The decision to accept the challenge isn't a mathematical cost/benefit analysis
- Luke must accept the challenge because of who he is: his family, values, and life story



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



The Hobbit “call
to adventure”:
Naked challenge

BILBO: Can I help you?

GANDALF: That remains to be seen. I’m
looking for someone to share in an adventure.

BILBO: An adventure? No, I don’t imagine
anyone west of Bree would have much
interest in adventures. Nasty, disturbing,
uncomfortable things.... Good morning.

Gandalf responds with identity connections:

Bilbo's mother



Bilbo's life story



**Original
Identity**



Challenge



Victory



**Enhanced
Identity**

The Hobbit “call to adventure”

- Gandalf makes the challenge
- Bilbo says “no”
- Gandalf is unfazed
- This initial refusal is a normal part of the monomyth story



The Hobbit “call to adventure”:
Identity (life story – people)

GANDALF: To think that I should have lived to be “good morninged” by Belladonna Took's son as if I were selling buttons at the door.

BILBO: Beg your pardon?

GANDALF: You've changed, and not entirely for the better, Bilbo Baggins.

The Hobbit “call to adventure”: Heroic audience



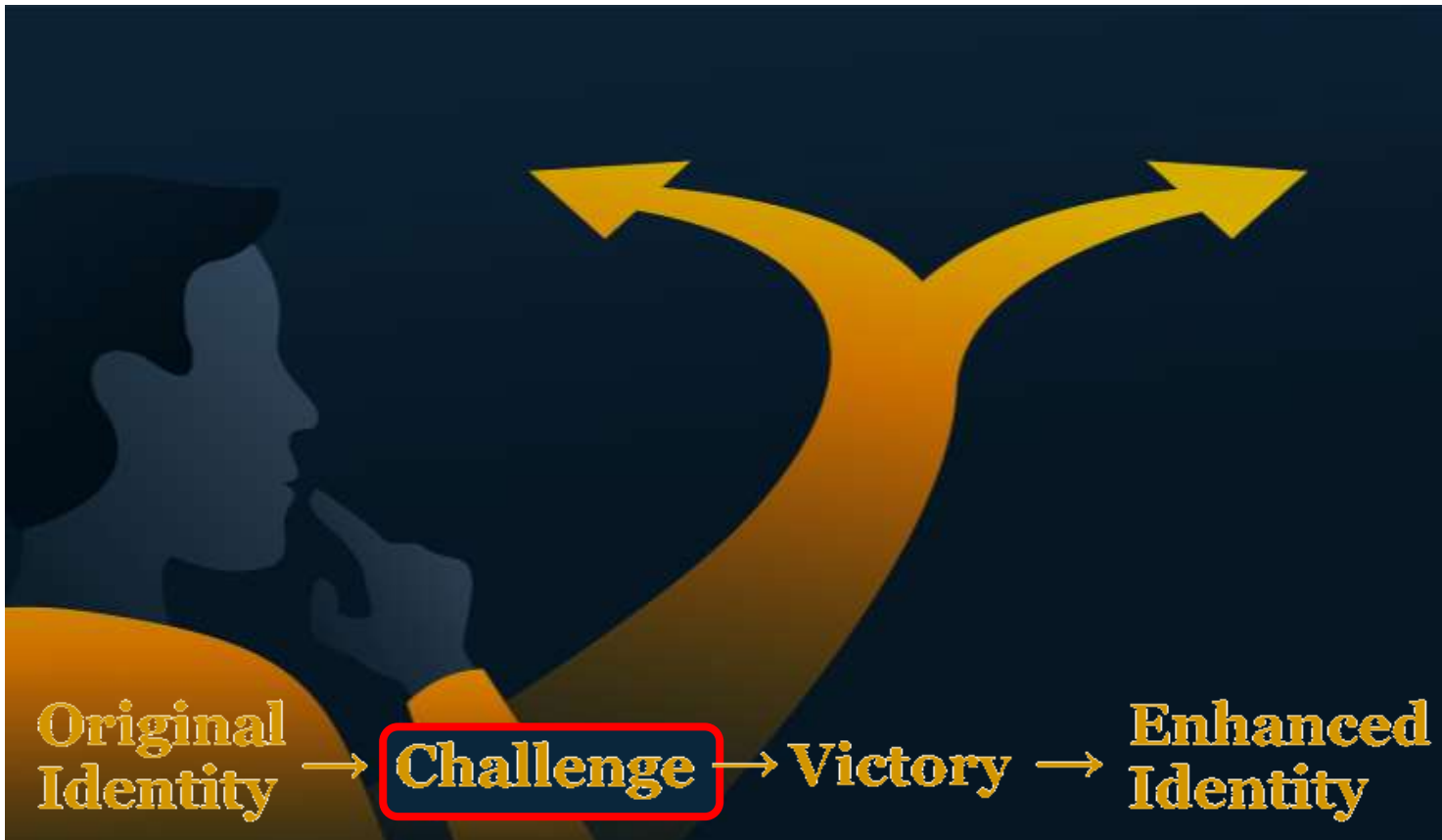
- In the full “call to adventure” scene Gandalf brings a large audience to Bilbo’s house
- Each of them has already committed to the challenge
- Their leader explains why his people, values, and life story compelled him to accept the challenge

The Hobbit “call to adventure”: Challenge → Victory



- Gandalf lays out the challenge with a map (his proposal document)
- It is a quest with enemies, a treasure, and an epic victory

The Hobbit “call to adventure”



The challenge is clear

- Leave behind the small self-focused world of the shire
- Go on an adventure to impact the larger world

It is urgent. The group is leaving in the morning. It is a stark “yes” or “no” decision.

Bilbo resists. Gandalf again appeals to Bilbo's identity:

Bilbo's life story



**Original
Identity**

→ Challenge

→ Victory

**→ Enhanced
Identity**

The Hobbit
“call to
adventure”



The Hobbit
“Call to
adventure”:
Identity (life
story)

GANDALF: I remember a young Hobbit who was always running off in search of Elves in the woods. Who would stay out late, come home after dark ... trailing mud and twigs and fireflies. A young Hobbit who would have liked nothing better than to find out what was beyond the borders of the Shire.

Again, Bilbo resists. Again, Gandalf appeals to Bilbo's identity:

Bilbo's ancestors



Bilbo's family history



**Original
Identity**



Challenge



Victory



**Enhanced
Identity**

The Hobbit
“call to
adventure”



Identity
(family
history -
people)

BILBO BAGGINS: I can't just go running off into the blue. I am a Baggins of Bag-end. GANDALF: You are also a Took. Did you know that your great-great-great-great-uncle Bullroarer Took was so large, he could ride a real horse? BILBO BAGGINS: Yes. GANDALF: Yes, well, he could. In the Battle of Green Fields, he charged the Goblin ranks. He swung his club so hard, it knocked the Goblin king's head clean off ...

The Hobbit “call to adventure”: Identity → Challenge

- Bilbo consistently resists with rational cost/benefit analysis
- Gandalf consistently responds by focusing on Bilbo’s identity: the people, values, and life story elements that support taking the challenge



**Original
Identity**

→ **Challenge**

→ **Victory**

→ **Enhanced
Identity**

The Hobbit “call to adventure”: Identity → “Yes”

Bilbo must accept the challenge because of who he is

- His life story – his adventuresome youth searching for elves
- His people – his ancestor who defeated the Goblin king
- An audience of others committed to this same challenge



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

The Hobbit “call to adventure”: Enhanced Identity → “Yes”



Original Identity → Challenge → Victory → Enhanced Identity

- Bilbo also must accept the challenge because of who he will become
- The promised victory will lead to an enhanced identity



The Hobbit “call
to adventure”:
→ Enhanced
Identity

GANDALF: You’ll have a tale or two to tell of
your own when you come back.

BILBO: Can you promise that I will come back?

GANDALF: No, and if you do ... you will not be
the same.

The Hobbit “call to adventure”

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



- Like the epic fundraising ask, this “call to adventure” makes a clear challenge
- It links the prospective hero’s identity to that challenge
- That challenge promises a victory
- That victory promises an enhanced identity

The Matrix “call to adventure”

Perhaps the most
famous decision scene
comes from *The
Matrix*





The Matrix
“call to
adventure”:
Challenge

MORPHEUS: This is your last chance. After this, there is no going back. You take the blue pill and the story ends. You wake in your bed and you believe whatever you want to believe. You take the red pill, and you stay in Wonderland and I show you how deep the rabbit-hole goes.

The Matrix “call to adventure”: Challenge



The challenge is clear:

- Leave behind the ordinary world
- Go on an adventure down the “rabbit-hole”

It is urgent. (“This is your last chance.”)

It is a stark “yes” or “no” decision.

**Just before this challenge, Morpheus focuses
on Neo's identity and life story**



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

The Matrix
“call to
adventure”:
Identity →
Challenge



The Matrix
“call to
adventure”:
Identity →
Challenge

MORPHEUS: Let me tell you why you are here. You have come because you know something. What you know you can't explain but you feel it. 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, kept inside a prison that you cannot smell, taste, or touch. A prison for your mind.

The Matrix “call to adventure”

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



- Morpheus reveals Neo's identity as a life-long prisoner
- This identity compels Neo to take the challenge
- Unless he takes the challenge, his identity will not change

The epic challenge elements: Yes/no with a deadline



The guiding sage presents a heroic challenge

- It is a stark “yes” or “no” choice
- There is no “just a little bit” option
- There is no “maybe someday” option

The epic challenge elements:

Identity → “Yes”

- The choice is not a matter of statistically analyzing pros and cons
- The guiding sage shows the identity elements (life story, people, and values) that support taking the challenge
- “You are the kind of person who accepts a challenge like this”



**Original
Identity**

→ **Challenge**

→ **Victory**

→ **Enhanced
Identity**

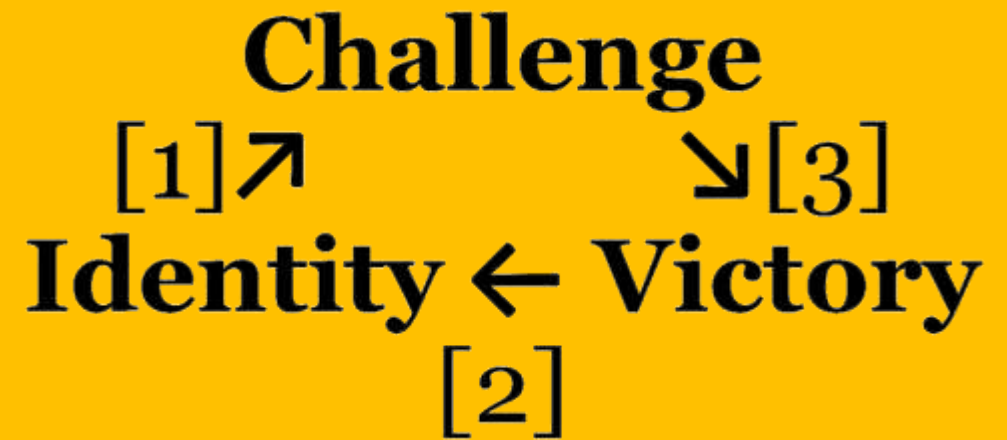
Challenge
↗ ↘
Identity ← Victory

Original Identity → Challenge → Victory → Enhanced Identity

The epic “call to adventure” includes the full story cycle

- The hero's identity compels accepting the challenge (*Identity → Challenge*)
- The challenge promises a victory (*Challenge → Victory*)
- The victory is personally meaningful because of the hero's identity (*Victory → Identity*)

The story cycle fundraising ask



[1] **Identity → Challenge** sentence

“You have ... [here describe a connection with the donor’s identity].”

[2] **Victory → Identity** sentence

“You understand ... [here describe how the victory would be meaningful to the donor].”

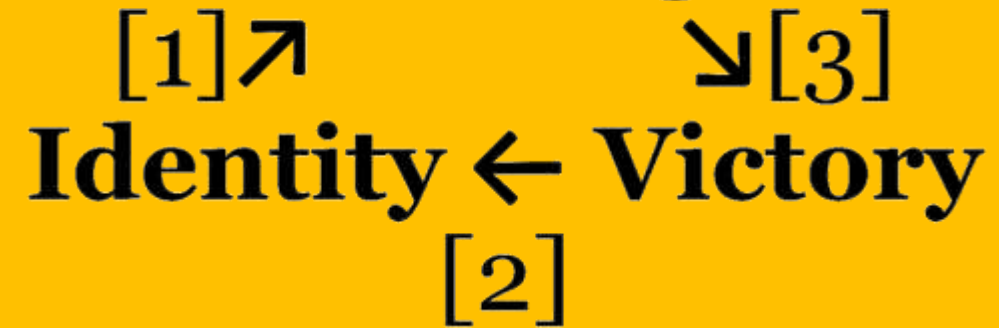
[3] **Challenge → Victory** sentence

“Would you consider a gift of \$_____ to ... [here describe the promised victory]?”

The story cycle fundraising ask



Challenge



[1] **Identity** → **Challenge** sentence

You have changed so many lives through your support of our job training programs, just as your mother liked to say, 'Giving people a hand up, not a handout.'

[2] **Victory** → **Identity** sentence

"You understand how this new technology center could provide real opportunities for young people who start out with nothing but a willingness to work hard, just like you did."

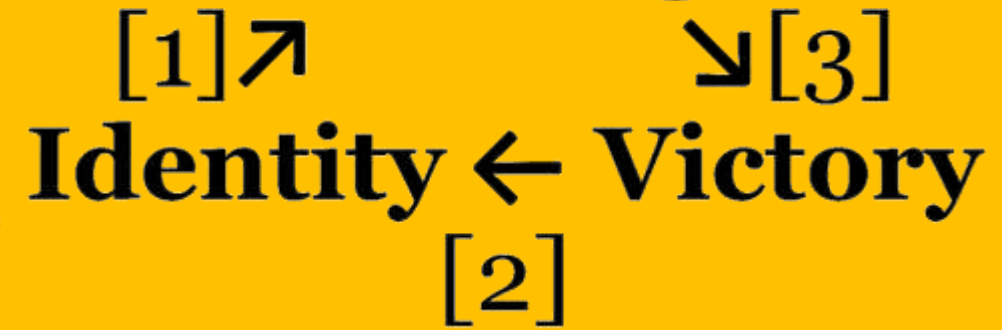
[3] **Challenge** → **Victory** sentence

"Would you consider a gift of \$100,000 as one of our leadership-level donors to help transform our community in this way"

The story cycle fundraising ask



Challenge



[1] **Identity** → **Challenge** sentence

“You have meant so much to this football program since your days as a player over thirty years ago.”

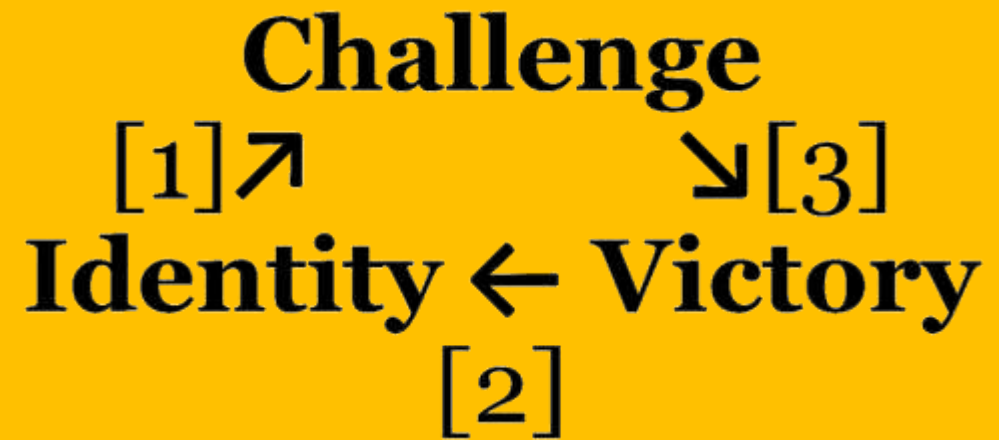
[2] **Victory** → **Identity** sentence

“You understand how this new stadium expansion would launch our program onto the national stage.”

[3] **Challenge** → **Victory** sentence

“Would you consider a gift of \$2 million to lead the campaign to make this a reality?”

The story cycle fundraising ask



[1] **Identity** → **Challenge** sentence

“You have been so dedicated to improving the lives of patients at this hospital going back even before your own father received care here.”

[2] **Victory** → **Identity** sentence

“You understand how this new “Campaign against Cancer” can change the lives of so many right here in our community.”

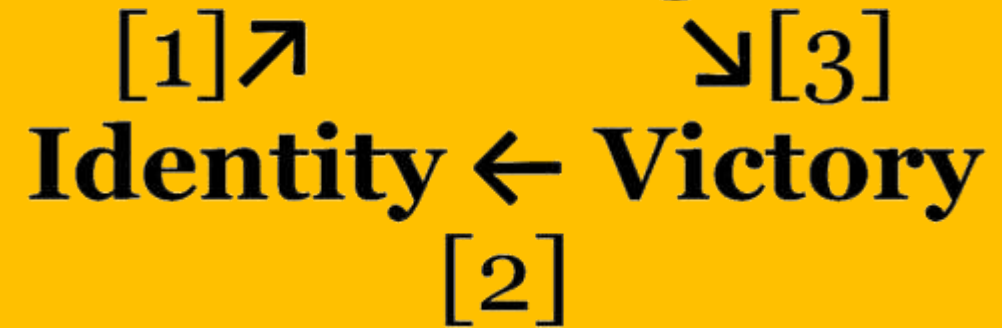
[3] **Challenge** → **Victory** sentence

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

The story cycle fundraising ask



Challenge



[1] **Identity** → **Challenge** sentence

“You have been well-known in this community as an advocate for our youth summer camps.”

[2] **Victory** → **Identity** sentence

“You understand how camp scholarships can change the lives of young people, giving them a chance to learn and grow, just as you did in your youth.”

[3] **Challenge** → **Victory** sentence

“Would you consider a gift of \$50,000 to create the Smith Family Permanent Endowed Scholarship Fund to give that opportunity to future generations of campers?”

The epic fundraising challenge



- In story, the prospective hero faces a stark choice
- This is a “yes” or “no” decision
- In fundraising, this means asking for a specific amount

The epic fundraising challenge: How much?

In story, the heroic decision is difficult. The challenge is hard.

In fundraising, a heroic donation is not a quick and easy choice. To make a meaningful story, the gift must be a meaningful amount. The heroic donation is a sacrificial gift. It is a “stretch” gift.





The epic fundraising challenge:

Heroic amount

All hero stories require 100% of the hero's capacity.

- Estimate donor capacity
- Guess: A major gift is typically 10 to 25 times regular annual giving
- Menu: Share stories of others' gifts and note the reaction



The epic fundraising challenge: The worst amount

“Give what you can. Anything helps.”

This won't inspire a major gift because it isn't a heroic challenge; it's begging. It's not a call to adventure; it's a call to convenience. It's a mundane choice in a mundane story.

The epic fundraising challenge: Heroic audience



- Peers (or aspirational peers) who have already pledged are a great audience
- As in *The Hobbit*, they can share why they have accepted the challenge
- They can create a donor community of fellow adventurers

The epic fundraising challenge: The guiding sage makes the ask



Audience members do not make the ask.
“At this time, the board member ... should pretend to be deer caught in headlights. No motion, no comments. The temptation will be great to break the silence and reduce the awkwardness, but everyone needs to shut up.”

- Holly Million



Conclusion: Advance the donor's hero story

- Knowing the full story cycle can lead to a better ask and better follow up.
- A “no” is not the end of the story. It’s a normal step in the hero’s journey. The “yes” often comes later.
- A “yes” is not the end of the story. The charity must still deliver a victory and enhanced identity.

Advancing the donor's hero story requires a "call to adventure"

The elements of the effective "call to adventure" are also the elements of the effective ask

- The ideal challenge links to the prospective hero's past identity
- The challenge promises a future victory
- The promised victory results in an enhanced identity (private meaning or public reputation)



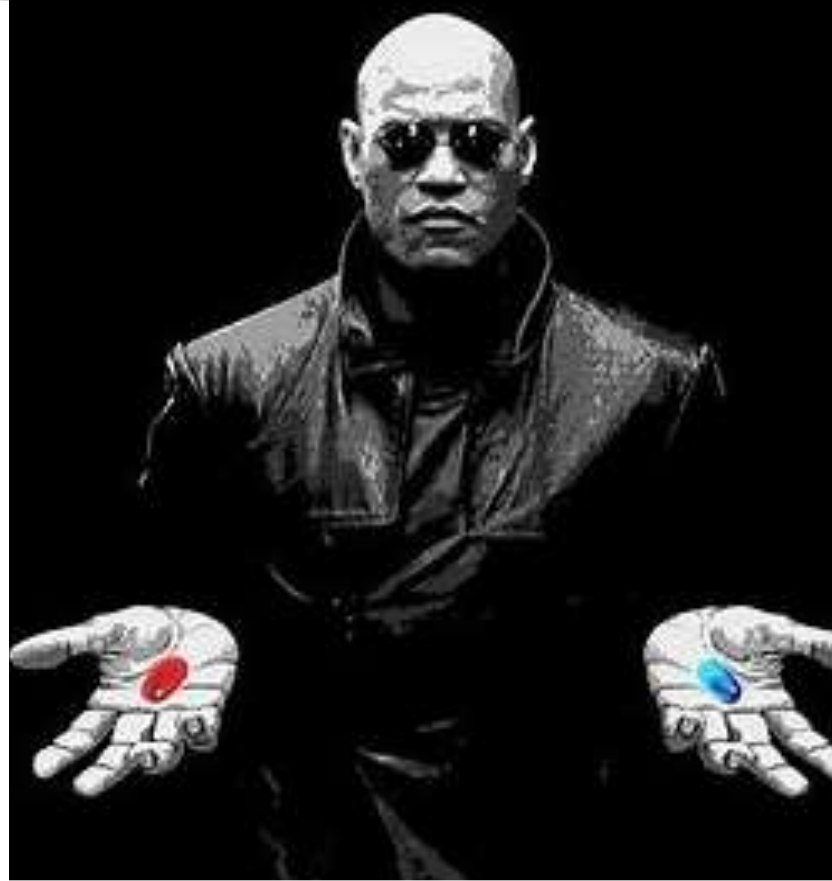
Original Identity → **Challenge** → **Victory** → **Enhanced Identity**



Advancing the donor's
hero story requires a
guiding sage

The guiding sage challenges with
a heroic choice.

Who is this sage? It is Obi-Wan,
Gandalf, Morpheus ... and you!



Making the perfect fundraising ask

Lessons from Obi-Wan, Gandalf, and Morpheus

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