



# From **“Money-Getter”** to Ministry

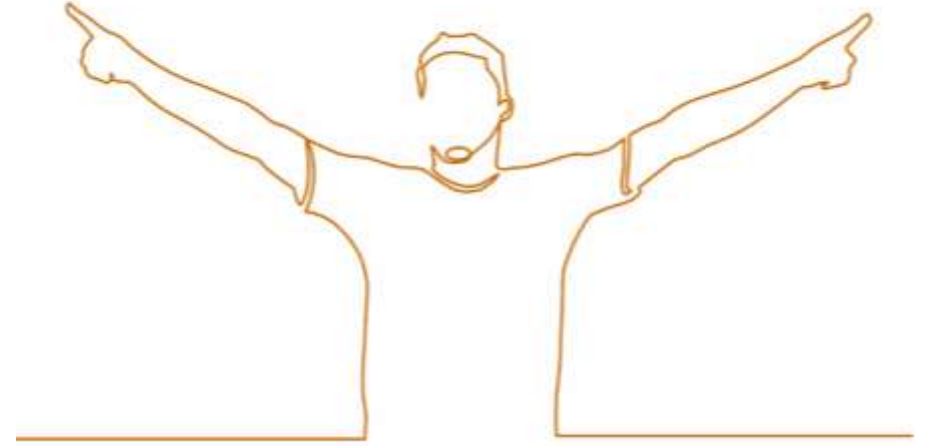
**How the Biblical  
Role of the  
Fundraiser Leads to  
Larger Gifts**

Professor Russell James III

# Our first goal as fundraisers?

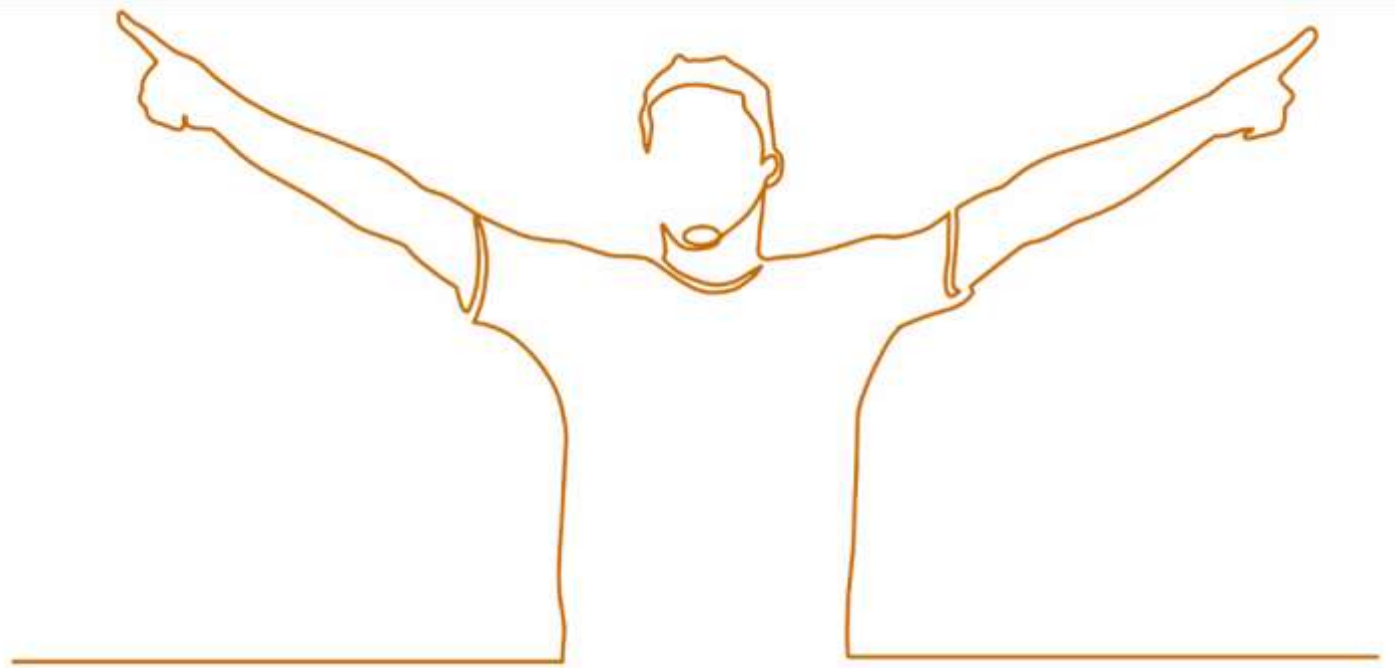
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The Biblical answer:  
Joyful giving from the heart



Are we  
focused on  
creating  
joyful  
giving?

In the NT  
giving is  
supposed to  
be...

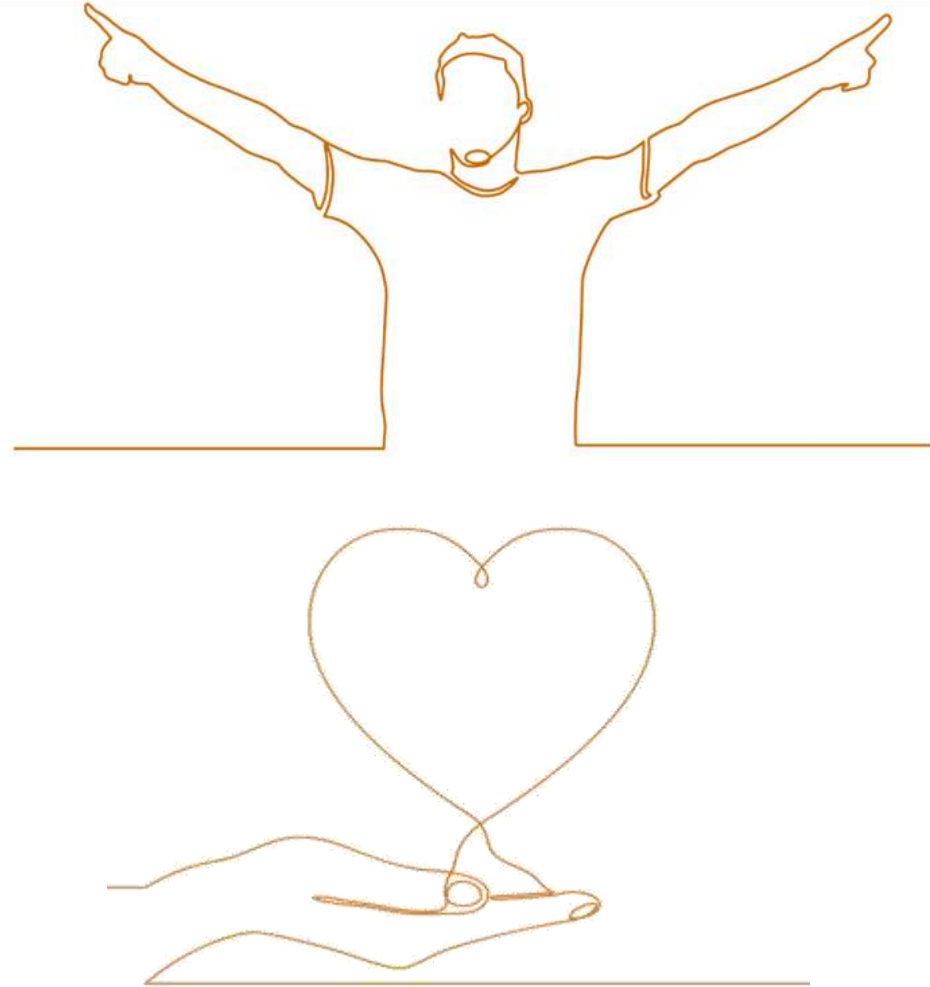


- **Extreme “party-time” enjoyment:** *apolausin* (1 Tim 6:17)
- **Hilariously joyful:** *hilaron* (2 Cor 9:7)
- **Happy/blessed:** *makarion* (Acts 20:35)
- **Super/hyper contented:** *en panti* [in every way] *pantote* [in all times] *pasan* [in all things] *autarkeian* (2 Cor 9:8)
- **Overflowing from the abundance of joy** (2 Cor 8:2)

# God wants joyful giving from the heart

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“Each one must do just as he has decided in his heart, not reluctantly or under compulsion, for God loves a cheerful [hilaron] giver.” (2 Cor 9:7 NASB).



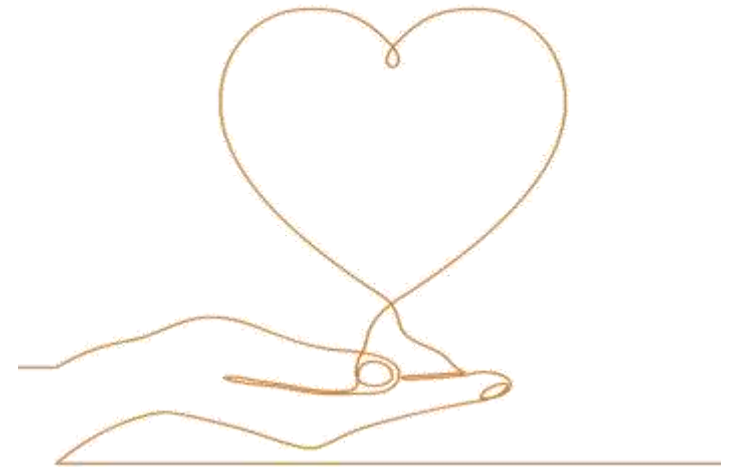
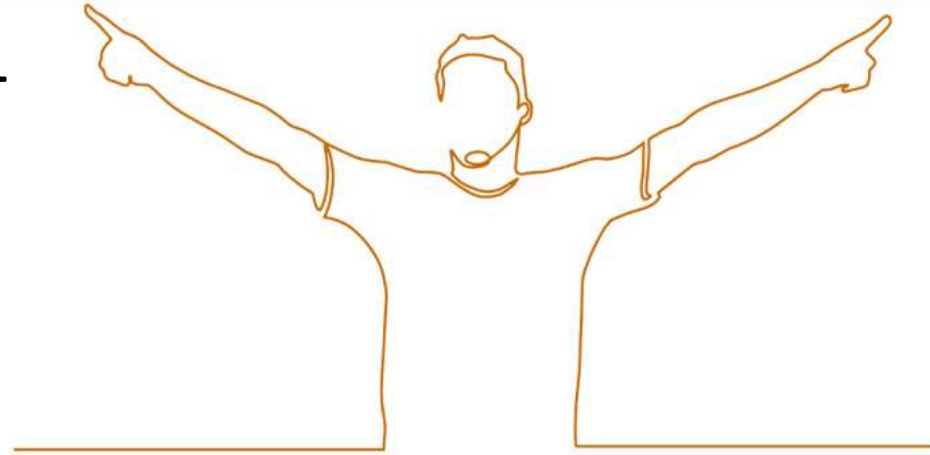
# Paul teaches “major gifts fundraising” to Timothy: Joyful giving from the heart

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In the ministry to wealth holders (1 Tim 6:17-19), Timothy is helping them to use their wealth “**FOR ENJOYMENT**” [purpose clause and the point of the X-shaped chiasmus]

How? By using it “to be rich in good works.”

- This word for “good” [*kalois*] means: “beautiful, as an **outward sign of the inward good, noble, honorable character**”;
- This word for “works” is “a deed (action) that **carries out (completes) an inner desire** (intention, purpose).”

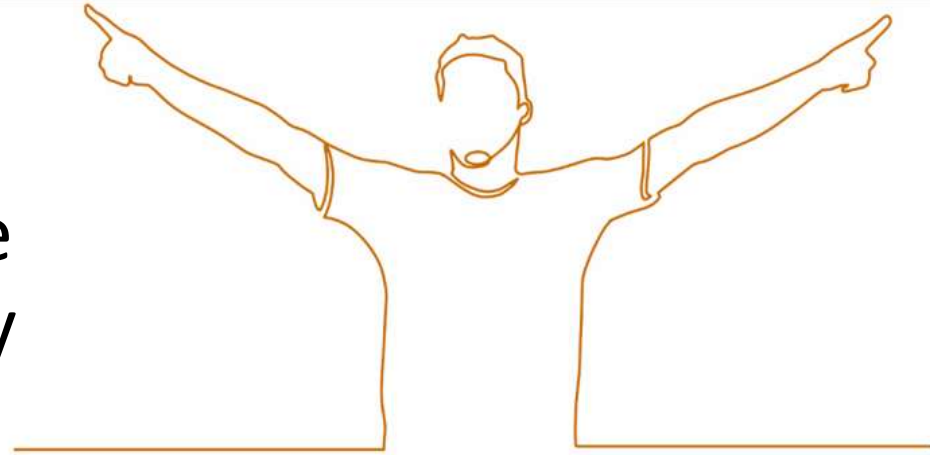


# God wants joyful giving from the heart: He always has...

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Capital campaign for the tabernacle: God said to Moses, “Tell the sons of Israel to take a contribution for Me; from everyone whose heart moves him you shall take My contribution.” (Ex 25:2 NASB).

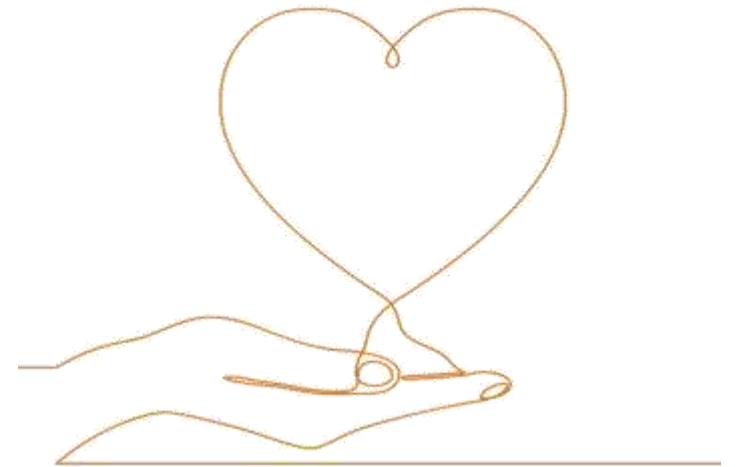
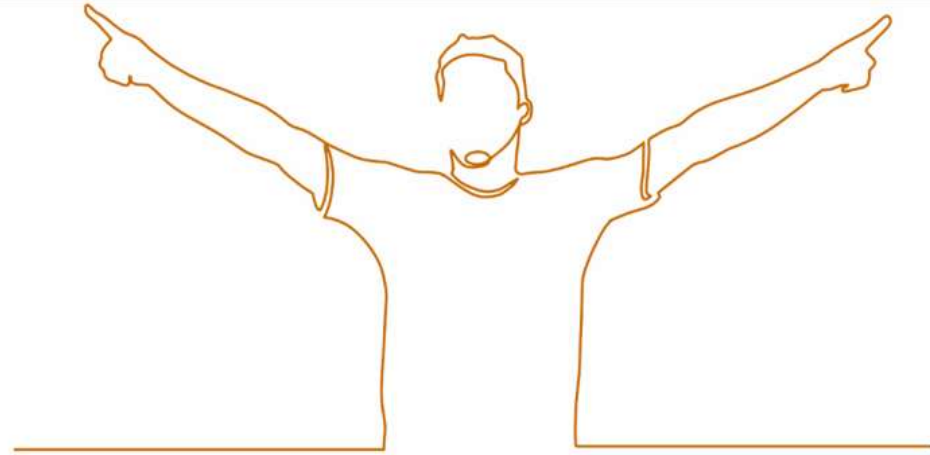
Moses later said to them, “Take from among you a contribution to the Lord; whoever is of a willing heart is to bring it as the Lord’s contribution.” (Ex 35:5 NASB).



# God wants joyful giving from the heart: He always has...

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Capital campaign celebration for the temple: “Then the people **rejoiced** because they had offered so **willingly**, for they made their offering to the Lord **wholeheartedly**, and King David also **rejoiced** greatly.” (1 Chron 29:9 NASB).



# EncourageGenerosity.com

Obviously, I think the goal should be to Encourage Generosity!

But, when we use the word “generosity,” there’s a problem...

The screenshot shows a web browser window with the address bar displaying "encouragegenerosity.com". The page title is "EncourageGenerosity.com" and the author is "Professor Russell James III, J.D., Ph.D., CFP". The website features a navigation bar with a search icon and a list of items. The main content is divided into two columns:

- Open-access books** (*in print at Amazon*)
  - Visual Planned Giving: Law and Tax
  - Fundraising Myth and Science Series
  - The Biblical Fundraiser Series
- Open-access audiobooks / videos**
  - Visual Planned Giving: Law and Tax
  - The Storytelling Fundraiser
  - The Epic Fundraiser

The browser's taskbar at the bottom shows icons for Windows, Edge, and other applications.

We want to  
encourage  
**GENEROSITY!**

For any fans of The  
Princess Bride:

“You keep using  
that word. I do not  
think it means what  
you think it  
means.”



In the NT  
“generous” is  
*haplotēs*

*Haplotēs* “generous”  
describes

- The ones who give (2 Cor 8:2)
- A type of giving action (James 1:5; Romans 12:8)
- The gift itself (2 Cor 9:13)
- The purpose for which God provided the wealth in the first place (2 Cor 9:11)



plural  
liking to give  
**generous** /'dʒɪnərəs/  
1 always ready to give money: She is very generous.  
buys me presents.  
large; generous

# The Bible word for “generous” is not what you think!

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- We might think of it as giving a lot, but that’s not what *haplotēs* means.
- It’s not the normal word for giving a lot. In fact, it’s not a normal word for giving at all.
- Outside of the Bible, *haplotēs* **had never been used** in reference to giving! *Haplotēs* giving is unique to the Bible.



# Generous: Reflective of the heart

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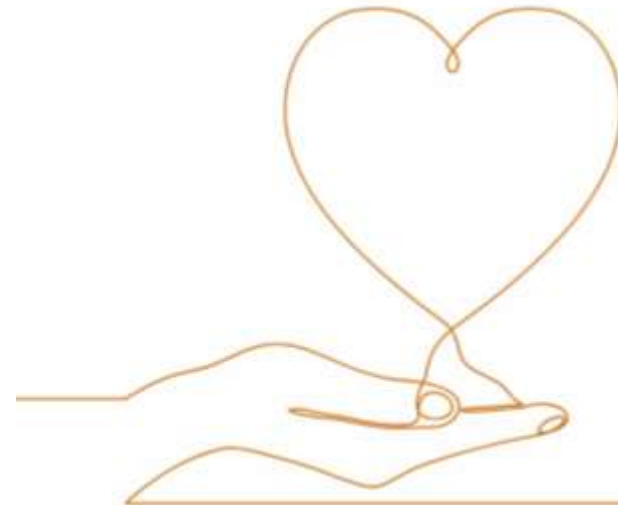
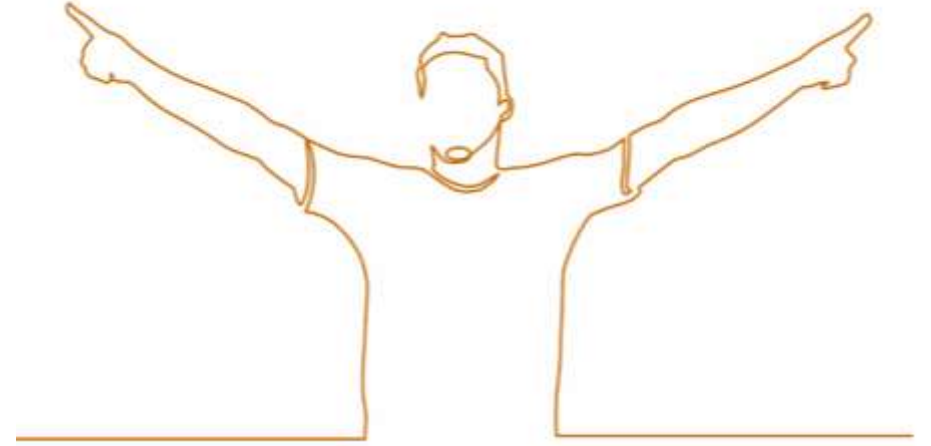
In the New Testament, a generous [*haplotēs*] gift does not mean big. It means **reflective of the heart**: sincere, single-hearted, simple. It's literally "un-folded" [*a*-"not," *plotes* from *pel* "folded"]; the opposite of double-folded, *diplos* → duplicitious.]



# Our first goal as fundraisers?

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The Biblical answer:  
Joyful giving from the heart



This isn't a **THEM** problem.  
It's an **US** problem.

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God wants joyful giving from the heart. If this is not the goal of our fundraising, we're doing it wrong.

Do you regularly consider:

- What gift would best express **this** donor's heart [personal values, life story, and internal identity]?
- What gift would be the most enjoyable for **this** donor?
- Or are we just "money-getting"?



# Who are you being?

## The secular answer

- “Fundraiser” (first used in 1880s) is not a scriptural term.  
Fund = “money”  
Raiser = “getter”
- “Money-getter” isn’t inspirational.
- And it’s not informative; every job “gets money,” (farmer, prostitute, drug dealer, etc.) but “money-getter” says nothing about the work itself.



# Fundraiser: The job description

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What does scripture say?

What's the role?

What's the job description?



# Paul acts as a “fundraiser”: **The helpful advisor**

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How does Paul describe his fundraising message to the donors?

- “But in this matter I give you an opinion; for my doing this **helps forward your own intentions**” (2 Cor 8:10, Weymouth).
- “But to counsel, **I advise you this to help you...**” (2 Cor 8:10a, Aramaic Bible in Plain English)
- “And this is my opinion about **what is helpful for you** in this matter...” (2 Cor 8:10a, Berean Standard Bible)



# Paul sends a “fundraiser”: **The helpful advisor**

- Titus is sent EXPLICITLY as a fundraiser: “So we have urged Titus, who encouraged your giving in the first place, to return to you and encourage you to finish this ministry of giving.” (2 Cor 8:6 NLT).
- What should we call Titus the fundraiser? “If anyone asks about Titus, say that he is my partner [*koinōnos*] who works with [*syn-ergos*] me **to help you.**” (2 Cor 8:23a NLT)
  1. Through Titus, the donors have direct, personal access to the ministry leadership. Titus is Paul’s closely connected partner [*koinōnos*] and fellow-worker [*syn-ergos*].
  2. Titus is there **to help** the donors (purpose clause: *eis hymas*.)

## Paul teaches a major gift “fundraiser”: **The helpful wealth advisor**

Timothy is to “*parangelle*” the wealth holders (1 Tim 6:17).

- *Para* – come close alongside
- *Angelle* – with an authorized message
- Greek present tense – constantly, continuously


Translations include “instruct,” “teach,” “tell,” and “counsel.” Professor Ceslas Spicq, describing this word in the noun form, *parangelias*, explains that it “can take on the mild sense of exhortation or counsel”



# The helpful advisor

I provide guidance, advice, and planning that helps donors

- To make an impact that reflects their personal values and life story (***Giving from the heart***)
- To have the most enjoyable giving experience (***Giving joyfully***)
- To give smarter. I show them how to make a personally meaningful impact while still accomplishing their other financial goals (***Giving from abundance is more joyful!***)

A person's hands are shown holding a white, rectangular box with a handle. The box is positioned in the center-right of the frame. The background is a blurred green, suggesting foliage. The text on the box is in a bold, dark green font.

**“Counsel”**  
**“Help you”**  
**“Advise you”**



# Tested 63 Fundraiser Job 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

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.



# 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)

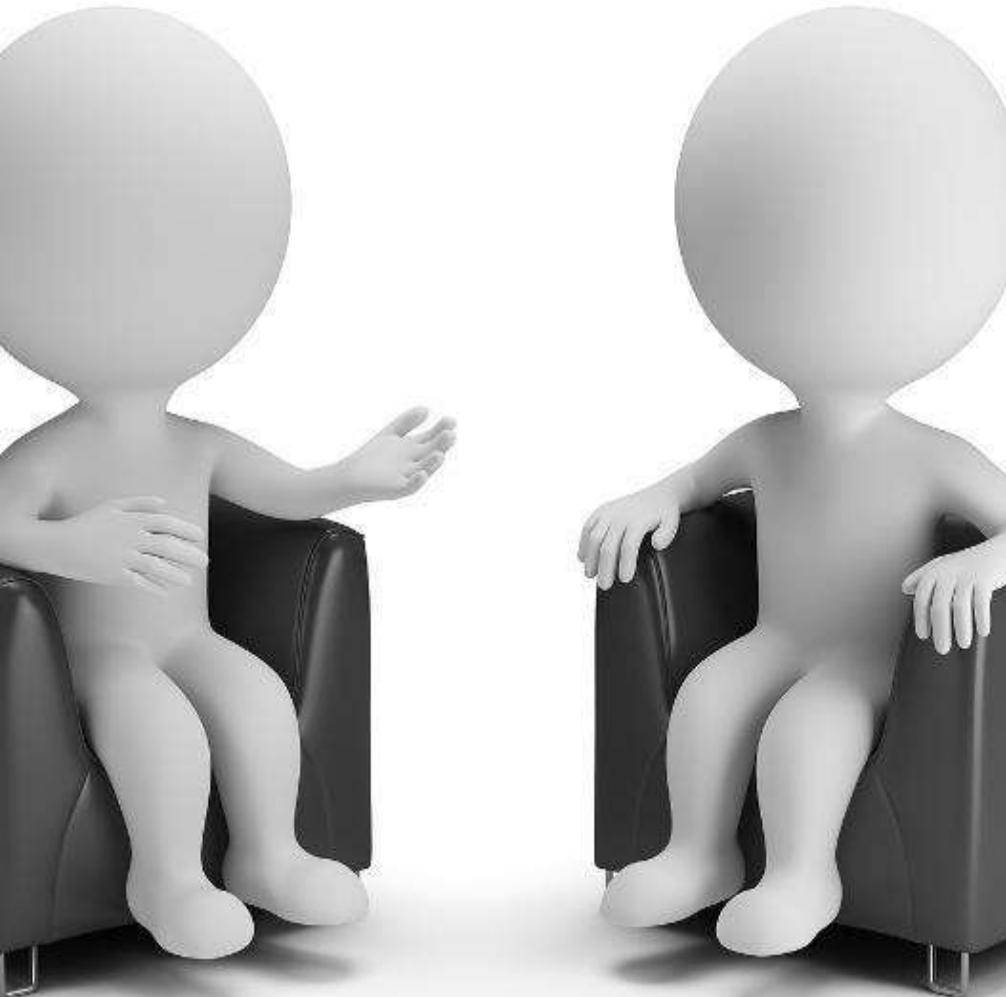
1. (do) Advancement
2. (do) Institutional Advancement
3. (co) Advancement
4. (do) Development & Marketing
5. (co) Business Development
6. (co) Institutional Advancement
7. (co) Advancement Development
8. (do) Development
9. (do) Advancement Development
10. (co) External Relations

*I provide guidance, advice, and planning that helps donors*

*vs.*

*I'm here to help the institution*

# The helpful advisor



Q: So, what do you do?

A: *I work with the president of [org]. My job is to help our donors* give smarter.

Q: How do you do that?

A: I help our donors plan their gifts to make the impact that's most meaningful for them. We work through what they care about. We discuss what's been important in their lives. Then we connect that with possible projects that reflect their values and fit into their life story. This lets them use their money in a way that's more personally significant than just consuming more stuff.

... Are there any causes that have been important in your life? ... What was it that connected you to that cause?



# Challenging the identity

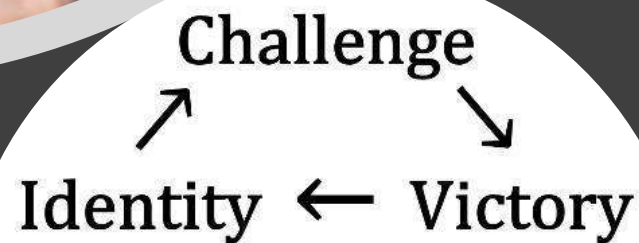
**CHALLENGE:** So, you're a fundraiser. You ask people for money.

**RESPONSE:** I don't ask people for money. I ask people to do good things. I'm there to bring them ideas. Sometimes that means a gift. Sometimes it doesn't. Sometimes it means a gift to another charity. It all depends on the donor's goals. It's about thinking creatively to build the best options that help the donor accomplish their most personally meaningful philanthropic goals.



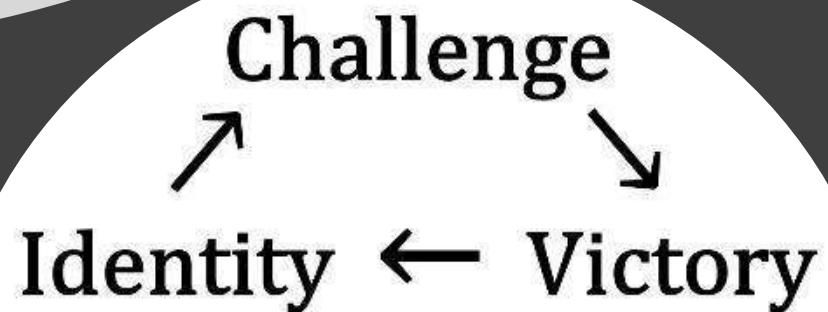
# Let me share a story...

- “I worked with one donor who is about your age. You actually remind me of her. Maybe because you both work with finance.” *[IDENTITY: You are like this donor]*
- “In talking with her I learned that she wouldn’t have been able to go to college without help from her late grandmother.” *[IDENTITY: life story motivates the action]*
- “I also learned that she wanted to give others that same chance at an education.” *[VICTORY: donor’s philanthropic goal]*





- “I shared the idea of creating a permanent endowed scholarship. It would be dedicated for women studying financial planning. And it would be named in honor of her grandmother.” *[CHALLENGE promising a personally meaningful VICTORY]*
- “She loved the idea.” *[Donor affirms value of VICTORY]*
- “But the \$250,000 minimum cost was too much for her.” *[Donor experiences barrier to VICTORY]*

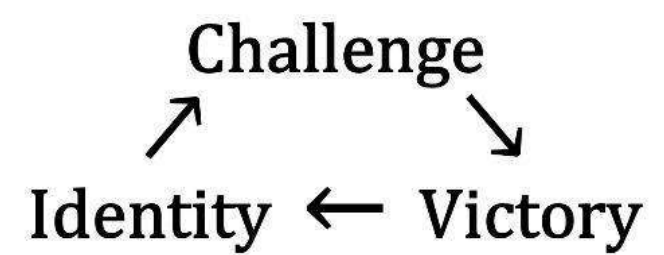




# Identity. Challenge. Victory.

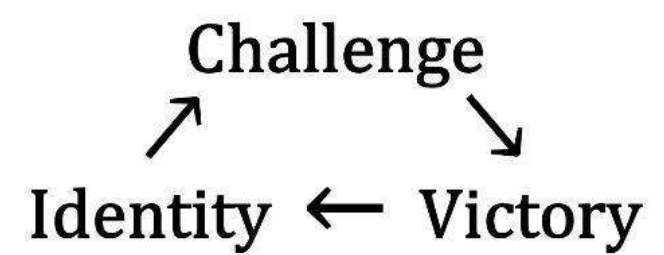
- “So, I suggested that she create a ‘virtual’ endowment. She donates the \$12,000 annual payout for students now, plus the same amount to build up the permanent fund over time. It’s backed up by a gift in her will to fully fund in case something happens. That way the permanent scholarship named for her grandmother starts right away.” *[Guiding sage provides magical instrument to help the donor accomplish her VICTORY.]*
- “I love to see how she connects with these young women now. Their lives have been changed because of her giving. And I think they have a special place in her heart because of her own journey.” *[Donor experiences VICTORY.]*

# Let me share a Christian ministry story



- “I helped one woman who is about your age. You actually remind me of her.” [***IDENTITY: You are like this donor.***]
- “In talking with her, I learned about her life story. She had first learned about Jesus through a bus ministry. It came to her neighborhood when she was a child. She went just to be with her friends, but the teaching changed her life.” [***IDENTITY: Life story motivates the action.***]
- “So, I worked with our leadership. We put together a plan covering all the costs of starting and permanently endowing a bus ministry. This even endowed part of a minister’s position to run the program.” [***CHALLENGE promising a personally meaningful VICTORY.***]

# Let me share a Christian ministry story



- “She loved the idea, but the \$500,000 total cost was too much. So, I suggested that she fund it over time. A \$50,000-75,000 annual commitment would allow the plan to move forward. She decided to make it happen! After her second gift, we were able to start running.” [***Donor experiences barrier to VICTORY; Guiding sage provides magical instrument to help the donor accomplish her VICTORY***]
- “I love to see how she connects with these young people now. Their lives have been changed because of her giving. And they have a special place in her heart because of her own journey.” [***VICTORY: Donor becomes rich in beautiful, good works that reflect the inward heart.***]
- ... So, tell me about your journey; are there any ministries that have been important in your life?



The story of a gift connecting with the donor's heart

- Life story
- Family
- Career
- Values



# Stories teach novel gift concepts



- Permanent fund
- Named for a loved one
- Scholarship for students in the donor's field
- Endowing a specific area of ministry
- Virtual (sinking fund) endowment



But we don't offer  
any of these things  
for our donors...

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Whose fault is that?

Would it help to produce a more  
joyful giving experience if you  
did?

Would it help to produce a  
giving experience that more  
directly reflects the donor's  
heart?

Isn't our goal joyful giving that  
reflects the donor's heart?

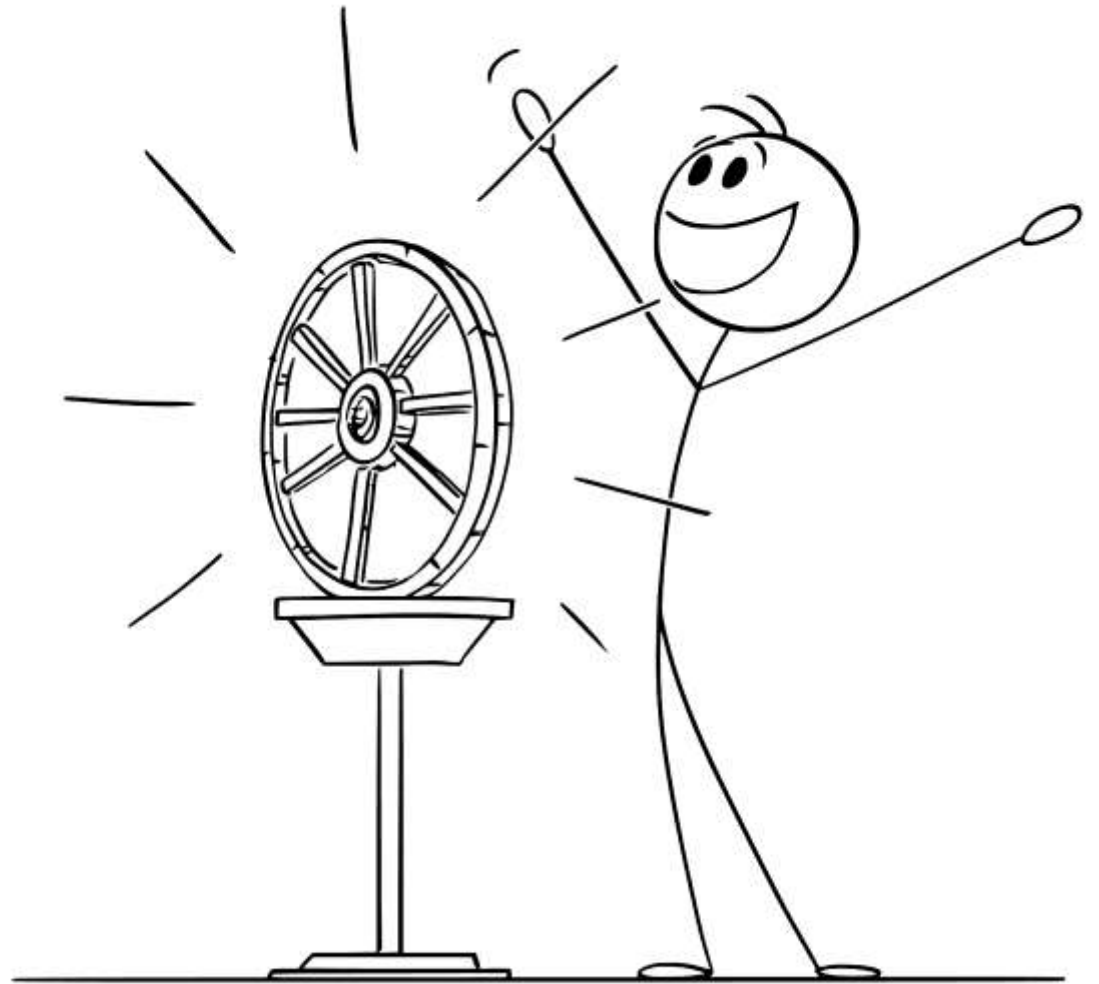


# And... it works

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- If people have a more enjoyable, personally meaningful giving experience, they will do it more.
- If they don't, they won't.

These are also the kinds of donor experiences available at the most successful major gifts fundraising nonprofits (i.e., your competition).



Obligation only giving:  
We don't do ministry in  
any other area this way

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- Would we change the worship service to make it more enjoyable and to more closely connect with the people's hearts?

**OR**

- We sing all verses of "A Mighty Fortress is Our God" and then we sing them again in the original German. It's their obligation to participate in the worship service. If the people don't like it, this means they need to be taught to enjoy it more.





Obligation only giving:  
We don't do ministry in any  
other area this way

---

- Would we change the preaching style to make it more enjoyable and to more closely connect with peoples' hearts?

**OR**

- I read monotone verses from the KJV and then after each one I say, "You should do this." It's their obligation to pay attention to the preaching service. If the people don't like it, this means they need to be taught to enjoy it more.



Obligation only giving:  
We don't do ministry in any other  
area this way

- What area of volunteer ministry would be most enjoyable for you? What connects with your heart?

**OR**

- You don't get to decide where you volunteer. You just submit the number of hours you're volunteering and then we decide where your hours will be used. We couldn't coordinate our ministry otherwise – and besides, we're the experts in charge, not you!

How much volunteering would you expect with this approach? How much giving?

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## Paul's fundraising campaign in 2 Cor 8 & 9 was for a restricted gift

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It was not for the general church budget. It was for a specific project.

Remember, a gift to cover a specific part of your pre-planned budget works like unrestricted money.

“Oh, but that's a hassle!” Ask yourself:

- Is it more enjoyable (joyful) for the donor to give in this way?
- Is our goal just money-getting or is it joyful giving that reflects this specific donor's heart?



# George Barna's study on the most effective fundraising churches

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He explains, “creatively segment your fund-raising efforts into ministry modules and then encourage people to ‘buy’ into one or more of those modules ... relatively few people get turned on by throwing their comparatively limited donations into a giant ministry money pot.”

“Donors must be put in touch with specific, tangible ministry goals that get them excited.”



Barna, G. (1997). How to increase giving in your church: A practical guide to the sensitive task of raising money for your church or ministry. [Kindle Edition]. Gospel Light Publications. p. 111-112.

**Vanilla Sweet Cream Cold Brew**  
110 Calories  
5g Fat  
14g Carbs  
1g Protein

**Cold Brew With Milk**  
35 Calories  
1.5g Fat  
3g Carbs  
2g Protein

**Salted Caramel Cream Cold Brew**  
220 Calories  
13g Fat  
24g Carbs  
2g Protein

**Vanilla Sweet Cream Nitro**  
70 Calories  
5g Fat  
4g Carbs  
1g Protein

**Iced Coffee With Milk**  
110 Calories  
1.5g Fat  
23g Carbs  
2g Protein

**Iced Shaken Espresso**  
100 Calories  
2g Fat  
17g Carbs  
4g Protein

**Vanilla Oatmilk Shaken Espresso**  
140 Calories  
4.5g Fat  
23g Carbs  
2g Protein

**Iced Flat White**  
150 Calories  
8g Fat  
13g Carbs  
8g Protein

**Honey Almondmilk Flat White**  
140 Calories  
3.5g Fat  
27g Carbs  
2g Protein

**Iced Caffè Latte**  
130 Calories  
4.5g Fat  
13g Carbs  
8g Protein

**Pumpkin Spice Latte**  
370 Calories  
16g Fat  
47g Carbs  
11g Protein

**Caramel Macchiato**  
250 Calories  
7g Fat  
37g Carbs  
10g Protein

**Iced Caffè Mocha**  
350 Calories  
17g Fat  
38g Carbs  
10g Protein

**Iced White Chocolate Mocha**  
420 Calories  
20g Fat  
49g Carbs  
11g Protein

**Iced Matcha Latte**  
200 Calories  
5g Fat  
29g Carbs  
9g Protein

**Iced Matcha Latte**  
200 Calories  
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cheatdaydesign.com

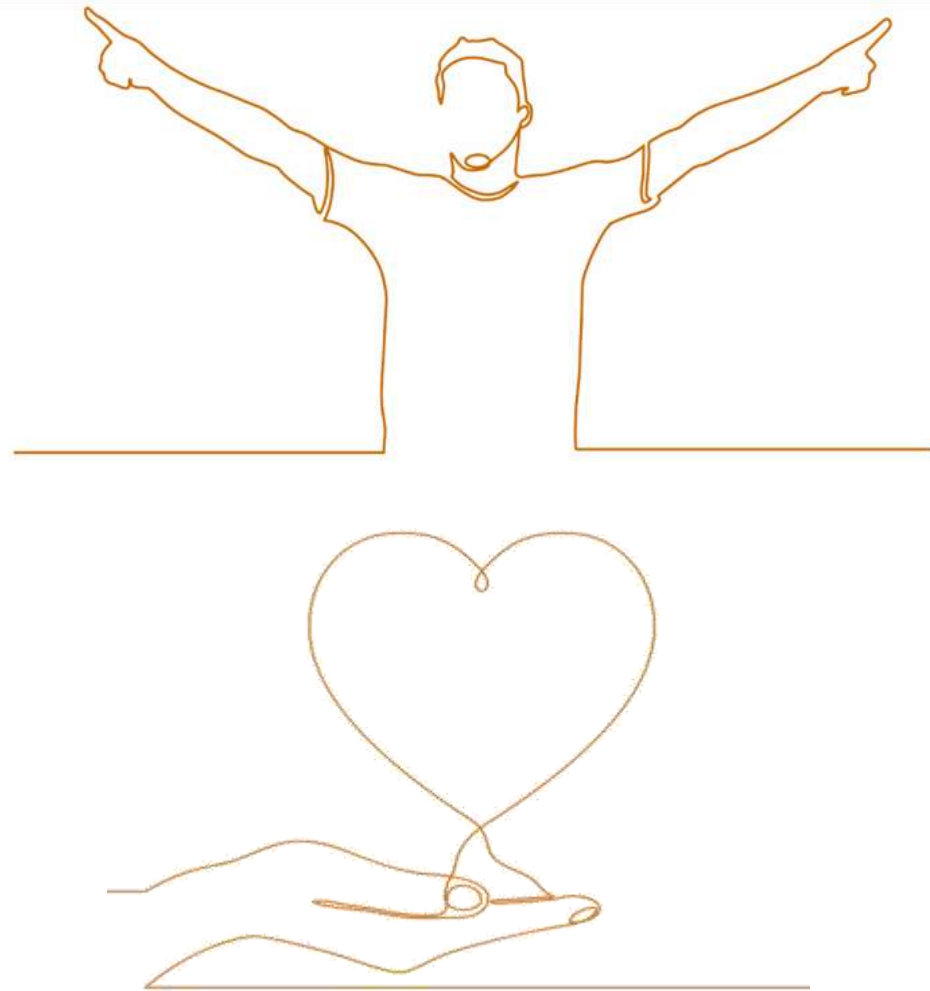


If you make it more fun,  
people will do it more

# Obligation only giving: We don't do ministry in any other area this way

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We focus on maximizing the joy, emotion, and personal meaningfulness of the experience in every other area of ministry – except for giving.



# Quit blaming the donors and start ministering to them!

**WRONG:** If only our donors were better people, then they would give more and enjoy it more.

**RIGHT:** How can I provide joyful giving opportunities that reflect and grow the positive aspects of this donor's heart?

The ministry process identifies those good, honorable, or noble features of a person's inward character. (**Identity**). It then connects those identity characteristics with a beautiful, visible, outward impact. (**Victory**). It uses this connection to motivate action. (**Challenge**).



# Getting to joyful giving from the heart

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1. Start with the positive aspects of their heart. (This is their character or **identity** from their personal values, close people, and life story.)
2. Help build a giving outcome (**victory**) that is a joyful expression of their heart. (This helps grow those positive aspects of their character or identity.)
3. Encourage (**challenge**) them to make it happen now!

## Start with the positive aspects of their heart / character / identity

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Paul before the pagan Greek Areopagus:

“So Paul stood in the midst of the Areopagus and said, ‘Men of Athens, I see that **you are very religious** in all respects. For while I was passing through and examining the objects of your worship, I also found an altar with this inscription, ‘TO AN UNKNOWN GOD.’ Therefore, what you worship in ignorance, this I proclaim to you.’” (Acts 17:22).



Start with the positive aspects of their heart / character / identity

---

Paul before King Agrippa:

“King Agrippa, I consider myself fortunate that I am about to make my defense before you today, **especially because you are an expert** in all customs and questions among the Jews;” (Acts 26:2b-3a).



Start with the positive aspects of their heart / character / identity

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Paul before Felix, governor of Judea:

“Knowing that **for many years you have been a judge** to this nation, I cheerfully make my defense,” (Acts 24:10b).



Start with the positive aspects of their heart / character / identity

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Paul before challenging Timothy to stay committed

“For I am mindful of **the sincere faith within you**, which first dwelled **in your grandmother Lois and your mother Eunice**, and I am sure that it is in you as well.” (2 Timothy 1:5).



# Start with the positive aspects of their heart/character/identity

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1 Tim 6:17 major gifts “fundraising” message to the wealth holders

- **Identity** (Personal Values) – You are continuing in the ongoing process of being not “high-minded,” not above or separated from the fellowship community
- **Identity** (Life History) – You have, already in the past, not set your hope in the uncertainty or hiddenness of wealth, but on God
- **Identity** (Close People) – God is the one who richly supplies all of us with all things for the purpose of enjoyment: ... to be a good sharer with the fellowship community



# Here's an idea: Teach by asking questions

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**Jesus often taught this way.** In Matthew, he does this in 5:13, 5:46, 5:47, 6:25, 6:26, 6:27, 6:28-29, 6:30, 7:3, 7:4, 7:9, 7:10, 7:16, 8:26, 9:4, 9:5, 9:15, 10:29, 11:7, 11:8, 11:9, 12:4, 12:5, 12:11, 12:26, 12:27, 12:29, 12:34, 14:31, 15:3, 16:8, 16:9, 16:10, 16:11, 16:13, 16:15, 16:26, 17:25, 18:12, 18:33, 19:4-5, 19:17, 21:16, 21:25, 21:31, 21:40, 21:42, 22:18, 22:20, 22:31-32, 22:42, 22:43-44, 22:45, 23:17, 23:19, 23:33, 24:45, 26:10, 26:53, 26:54, and 26:55.



Let's get practical!  
How do we actually DO  
this with REAL donors?

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Find their donor joy: Help them define a personally meaningful philanthropic victory **that reflects their heart** (i.e., identity from their personal values, life history, and social/family norms from their close people)

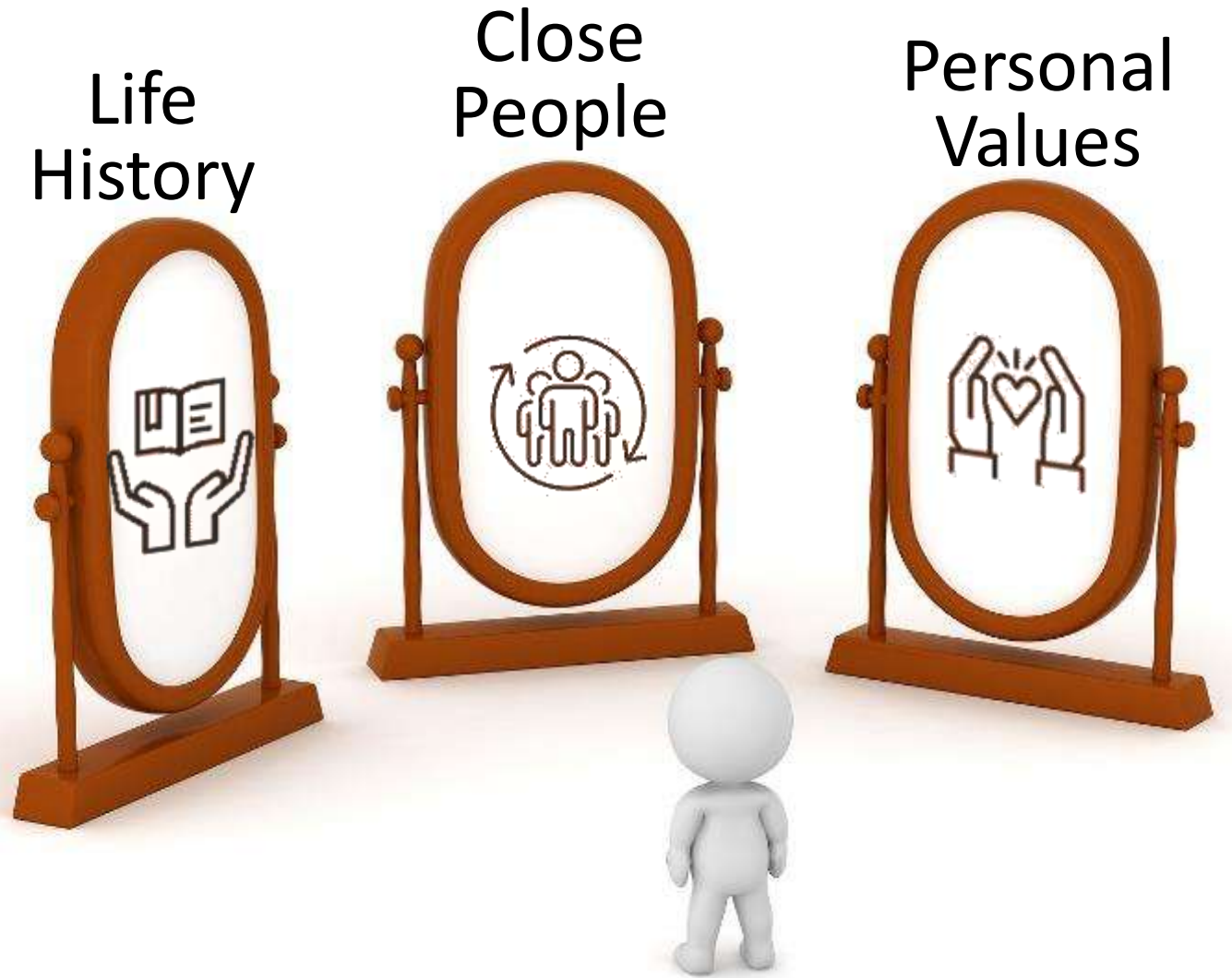


# Identity

How do the most successful fundraisers help the donor connect their identity

(personal values, life history, close people)

with the charity, the cause, or philanthropy?



**Find their donor joy:** Help them define a personally meaningful victory from their identity (personal values, life history, and social/family norms)

“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.



“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

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

## Life History

Find their donor joy:  
Help them define a personally meaningful victory from their identity

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

“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

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

## Close People

Find their donor joy:  
Help them define a personally meaningful victory from their identity

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

“Who are your philanthropic role models?”

“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?”

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

## 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/>

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

Find their donor joy:  
Help them define a personally meaningful victory from their identity

“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



# VICTORY:

How do the most successful fundraisers help the donor to define a personally meaningful victory?

**Find their donor joy:** Help them define a personally meaningful victory from their identity (personal values, life history, and social/family norms)

“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?”

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

## 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?”

# Spot victory solutions



We've been listening. We've been identifying and confirming their story connections. Now we match these with donor experiences and gift options

- What experiences would strengthen these connections?
- What employees, beneficiaries, or other donors should they meet?
- What giving opportunities or instruments match?

The story cycle ask that starts with their heart



[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]

**The story cycle ask**

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

[4] *Be silent*

[1] **“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] **“You understand** how this new training center would provide real opportunities for young people who start out with nothing but a willingness to work hard, just like you did.”

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

**The story cycle ask**

[3] **“Would you consider a gift of \$100,000** as one of our leadership-level donors **to help transform our community in this way?”**

[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]

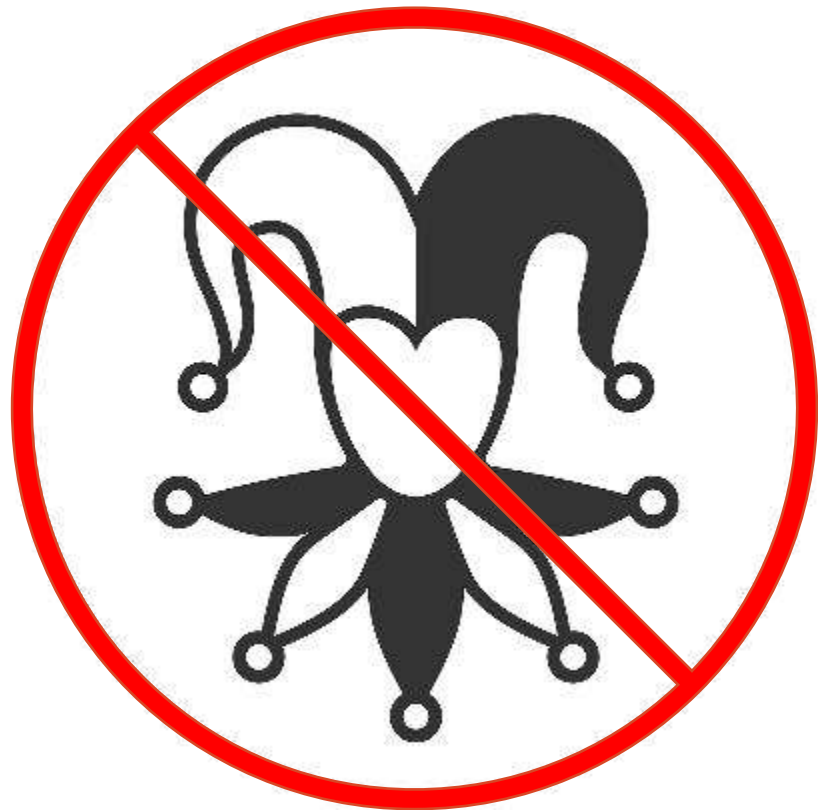
**The story cycle ask**

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

[4] *Be silent*

# Foolproof

Find their donor joy: Help them define a personally meaningful victory from their identity



## 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**

# What's the point? Joyful giving from the heart!

---

Does this work to generate major gifts? Absolutely yes!

Is that the point? No.

- The point is joyful giving from the heart.
- We HELP the donor to give in a way that brings them JOY and REFLECTS their inward heart (*haplotēs* “generous.”)



A close-up photograph of a person's hands holding a white rectangular sign with the word "NO" written in large, bold, black capital letters. The person is wearing a dark green suit jacket and a white shirt with a dark tie. The background is a plain, light-colored surface.

**NO**

But what if the donor says no?



The two  
outcomes of  
fundraising  
work

---

Either they give, or  
they don't, right?

A different outcome: Were they ready to give?

~~UNPREPARED~~

- “For I know your eagerness to help, and I have been boasting about it to the Macedonians, telling them that since last year you in Achaia were ready to give; and your enthusiasm has stirred most of them to action. But I am sending the brothers in order that our boasting about you in this matter should not prove hollow, but that you may be ready, as I said you would be. For if any Macedonians come with me and find you unprepared, we—not to say anything about you—would be ashamed of having been so confident. (2 Cor 9:3-4 NASB).
- The donors will be prepared (ready) or
- The donors will be unprepared (not ready)

# Were they ready to give?

1 Tim 6:18b describes an outcome of the major gifts fundraising process as

“ready to give, willing to share,” NKJV

“generous and ready to share” NASB

“always being ready to share with others” NLT

A gift is a single point-in-time decision. Being ready to give is an ongoing financial mindset and condition of the heart.

READY?



Change your language:  
Were they ready to  
give?

---

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?



Resume the role:  
Can I ask you a  
question?

---

“I really appreciate you considering this. I want to learn a bit more about your feelings on this project. Do you mind if I ask you a question?”



What parts are ready?  
What's missing?

---

- Begin with points of agreement
- Goal: Elicit the donor's confirmation of giving motivations (i.e., story connections)

After the "No"



Affirm that IF they gave it would be a joyful gift reflecting their heart

---

“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?”

# After the “No”



Affirm that IF they gave it would be a joyful gift reflecting their heart

---

“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?”

# After the “No”



Affirm that IF they gave it would be a joyful gift reflecting their heart

---

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

# After the “No”



Affirm that IF they gave it would be a joyful gift reflecting their heart

---

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

# After the “No”



# Diagnose the barrier: Opening questions

---

“Can you share with me the reason or reasons why this is not something you want to do?”<sup>1</sup>

“Can you tell me more about why you don’t think you can do this?”<sup>1</sup>

“What are your concerns?”<sup>2</sup>

Or for a “Maybe” response, “What factors are you weighing?”<sup>2</sup>

1) Fredricks, L. (2006). *The ask: How to ask anyone for any amount for any purpose*. John Wiley & Sons. p. 211; 2) Collins, M. E. (2017, Winter). *The Ask. Advancing Philanthropy*, 16-23, p. 22.



# 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. We come alongside to help work on the problem together.

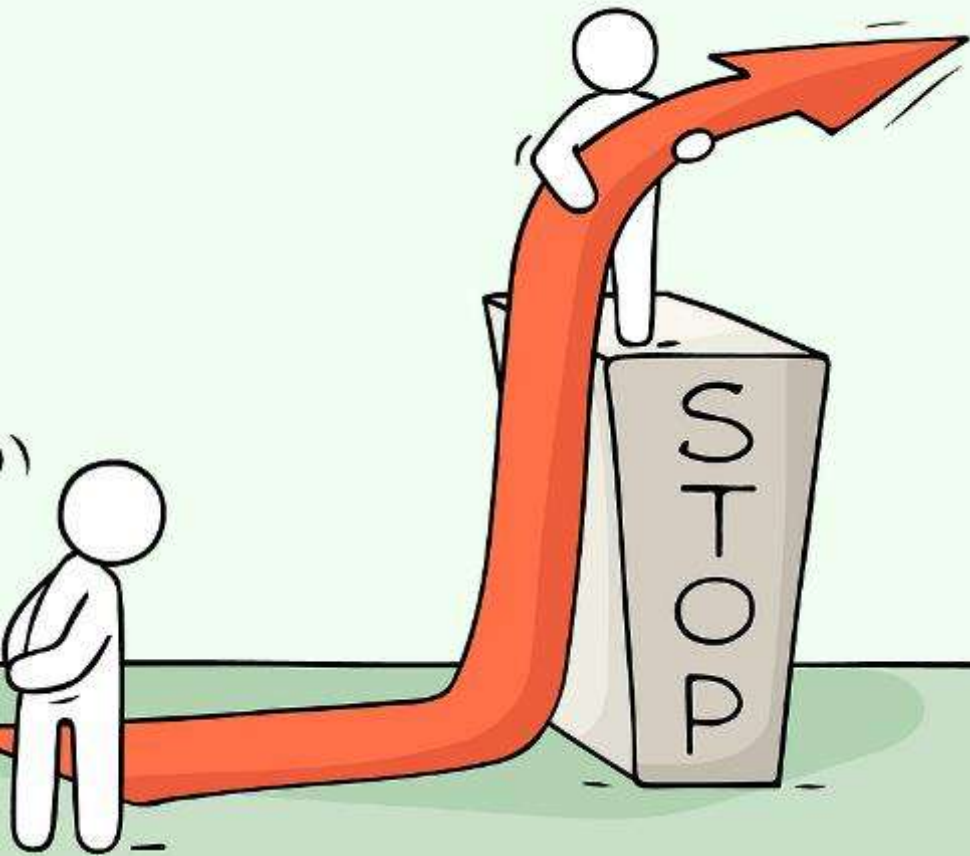




Confirming  
the story  
connections  
reframes the  
objection

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 people”\*



## 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

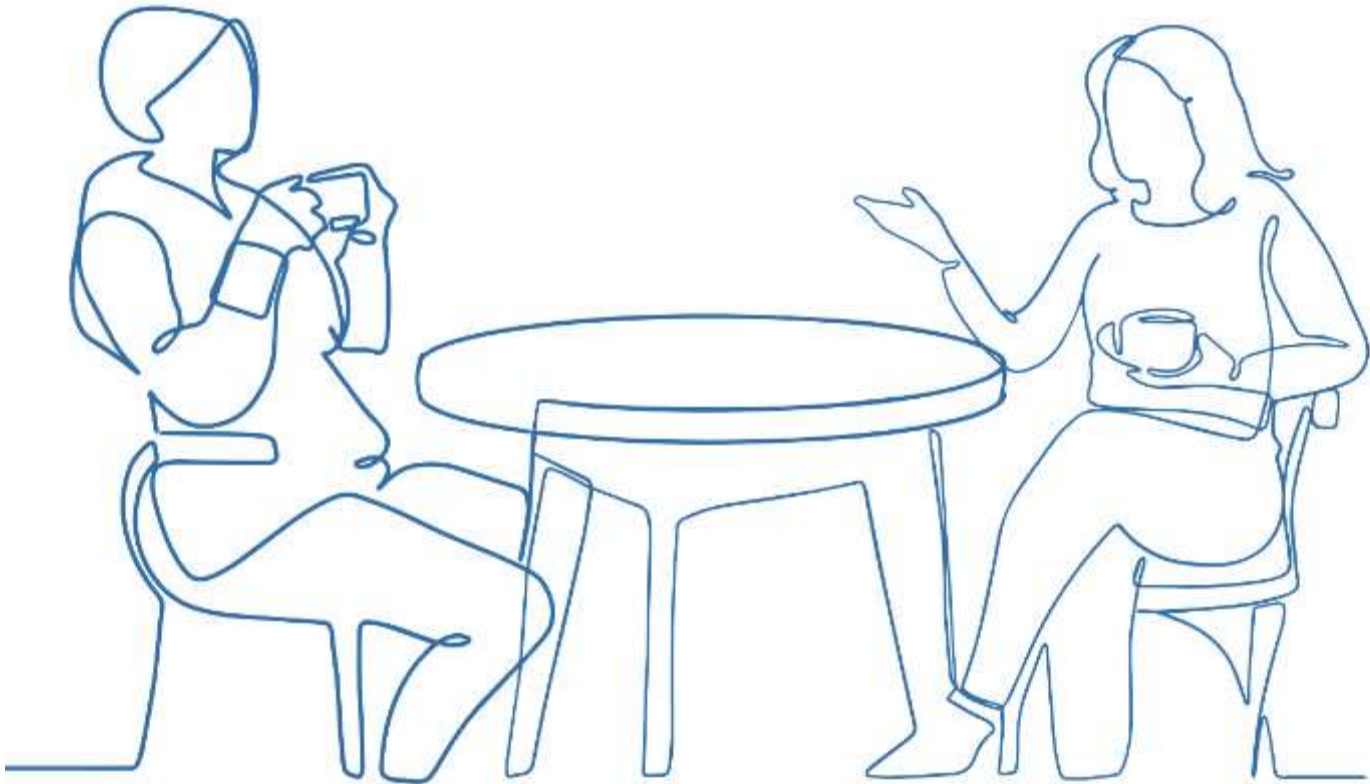
# Isolate the story barrier

“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?”



Come alongside to help the donor attack the 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!



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

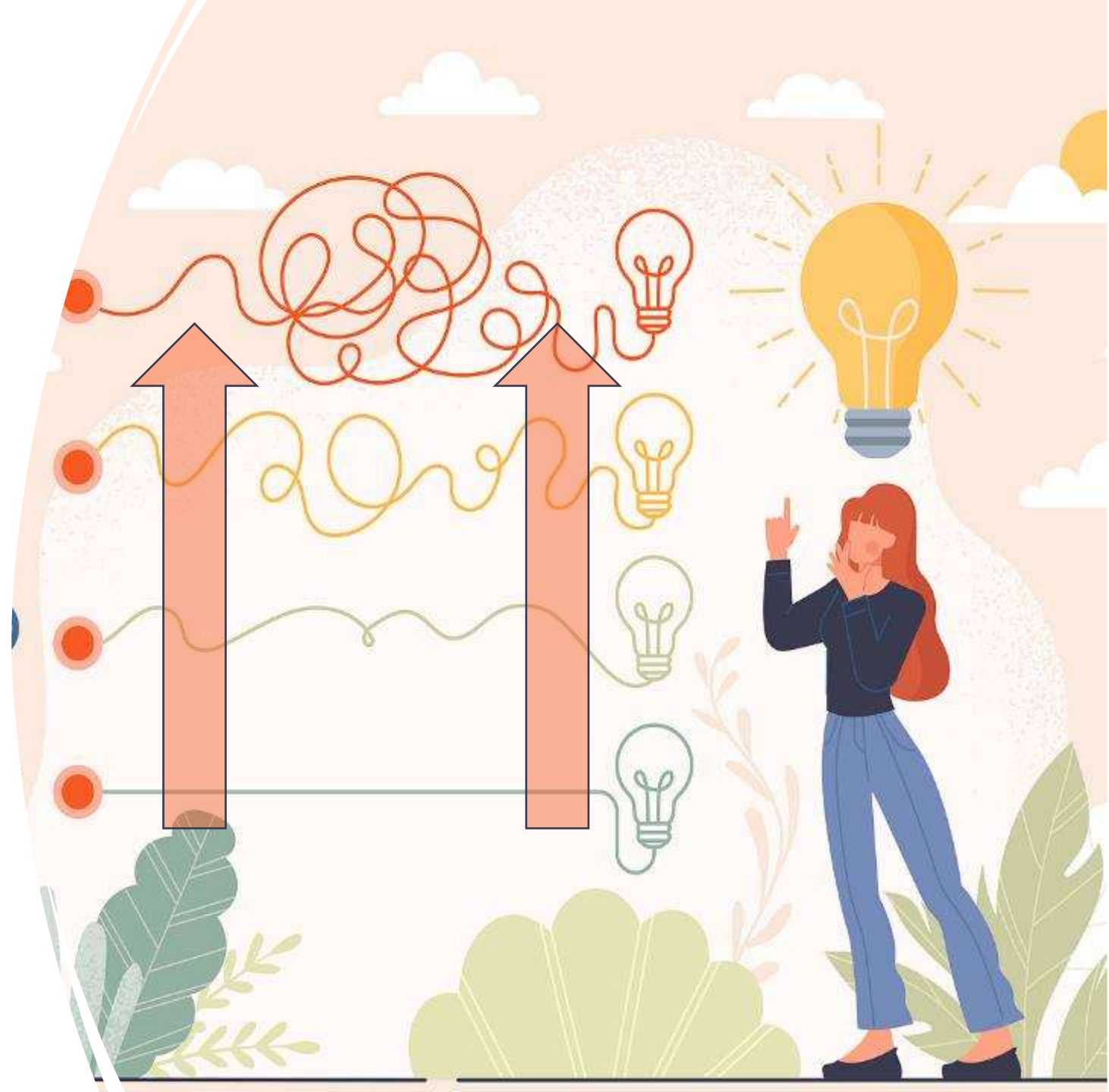
Or “We’re not asking that you write a check today. Our pledge period goes up to four years, so it would be \$125,000 each year.”

(Note: This is a response to a barrier, not an opening.)

# 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



# Attack the story barrier: Permission to share complex options



“If you wouldn’t mind visiting again, I’d like to work with some of our experts and put together a few personalized options for you to consider. 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?”

# What's the role?

## *"Para-angelle"*

(1 Tim 6:17)

- We come close beside [*para*] to deliver the authorized message [*angelle*] about enjoying [*apolausin*] wealth through good works that reflect the heart [*ergois kalois*].
- This verb is a present imperative
- “present imperatives give a command to do something constantly.”
- “The present imperatives characterize the activity under consideration as one which is to be repeated time and time again, a continual process, iterative by nature.”





Coming alongside to  
instruct  
*[para-angelle]*  
doesn't stop  
because of a "no"

- We can reconfirm the story elements that make the gift compelling for this donor. We can identify the barrier. We can propose solutions.
- And if the donor still isn't ready – that's OK. Presenting a compelling gift opportunity is still an important step.
- Financial barriers might exist today, but they can change tomorrow. It's not about a quick "yes." Instead, it's about getting donors prepared. It's about getting them ready.

The “no,” is not a problem  
for the persistent guide

“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



# Don't just sit there: Provoke! Motivate! Stir up!

---

- Hebrews 10:24 directs, “Let us think of ways to motivate [*paroxysmon*] one another to acts of love and **good works.**” (NLT).
- This is the same beautiful “good works” reflecting the inward good character as in major gifts fundraising of 1 Tim 6:17-19.
- We are to “spur on one another,” “stir up one another” “provoke” “encourage one another”
- *Paroxysmon* (Heb 10:24) Cognate: *paroksysmós* – a provocation which literally jabs (cuts) someone so they "must" respond.



# Be deeply thoughtful!

---

- “Let us think of ways”; “let us consider”
- *Katanoōmen* “properly, to think from up to down, to a conclusion; to consider exactly, attentively (decisively); to concentrate by fixing one's thinking”
- But what are we thinking deeply about?



# Be deeply personal!

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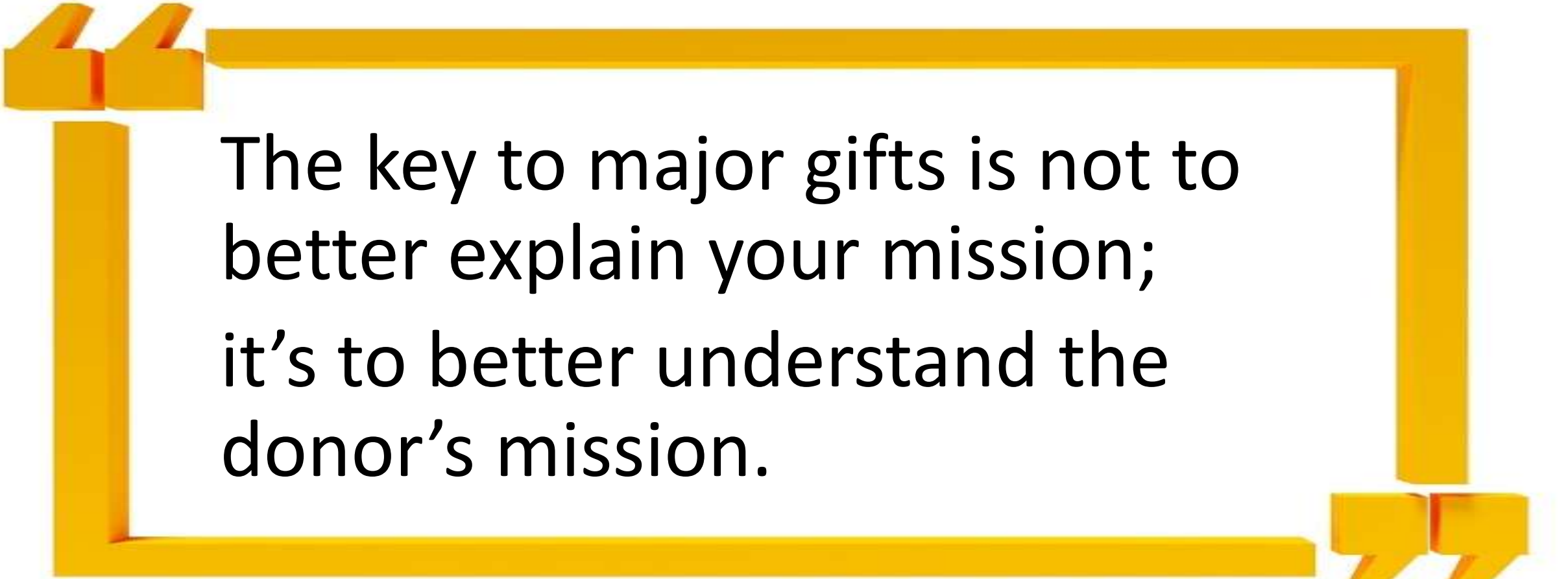
The verb actually modifies “one another.”

We are thinking deeply about **the other person** for the purpose of motivating them. In English, it’s a bit clunky, e.g.,

- “And let us consider one another in order to provoke love and good works,” CSB
- “And let us consider one another to provoke unto love and to good works:” KJV

This is deep thinking about the individual person. What would motivate, encourage, stir up, provoke this particular person?





The key to major gifts is not to better explain your mission; it's to better understand the donor's mission.

“And let us consider [*katanoōmen*] one another in order to provoke love and good works,” Hebrews 10:24 CSB; [“properly, to think from up to down, to a conclusion; to consider exactly, attentively (decisively); to concentrate by fixing one's thinking”]

# High performers v. others

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- In a study of about 1,000 gift officers, the highest producing 20% raised nearly 75% of total dollars
- High performers asked at capacity, “What would motivate **this donor** to give at their capacity?”
- The others asked at around 40% of capacity: “How much can we get away with asking them for? What’s the safe request?”



# The business answer for key accounts (major sales): Individual plans

---

One study looked at 20 Key Account Management practices across 209 businesses. Only one practice, having individual plans for each key account, simultaneously predicted:

- Increased share of customer spend
- Revenues
- Customer satisfaction
- Relationship improvement, and
- Improved retention



## Individual customer plans

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_



## Individual donor plans

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_

# The fundraising answer for key donors (major gifts): Individual plans

---

A nationwide study of the most effective major gifts fundraising metrics: “Written strategies for each gift officer’s top 25 to 50 prospects with specific initiatives, specific persons to be involved in each task including internal partners and external volunteers, and specific target dates for each purposeful action should be required and documented ...”

# Individual plans in business



The successful large-sales business acts as a valued advisor for its key customers. This consultative relationship requires individual plans.

Just selling doesn't need individual plans. The customer's path is always the same: Buy! Buy more!

Individual plans separate key account management from just sales.

# Individual plans in fundraising



- The goal is joyful giving that reflects this particular donor's heart
- If your story is always the same, then it's not the donor's story (and it's probably not ministry). An individual story requires an individual plan
- Just selling doesn't need individual plans. The donor's path is always the same: Give! Give more!

# Don't miss the point of your ministry!

---

1. Joyful giving
  2. That reflects the donor's inward heart (*haplotēs* "generous").
- We HELP the donor to have a giving experience that REFLECTS their inward heart and brings them JOY.



# What do you think?

- How does this reaffirm or challenge anything you think about your role?
- What questions, objections, problems, concerns might you, a donor, or someone else in your organization have?

- **Your goal:** Joyful giving from the heart
- **Your role:** I help donors have a more joyful giving experience that is more reflective of their own heart
- **Your position:** The helpful advisor who comes close alongside with an authorized message about wealth enjoyment
- **Your outcome:** Were they ready or not ready?
- **Your process:** We think deeply about the donor in order to “stir up,” “motivate,” “provoke.”

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From

**“Money-Getter”  
to Ministry**

**How the Biblical  
Role of the  
Fundraiser Leads to  
Larger Gifts**

Professor Russell James III