

Goblins, Ghouls, and Making the Ask

October 2024

Presented by: Barbara O'Reilly, CFRE | Principal



Windmill Hill
CONSULTING

Nice to meet you!

Barbara O'Reilly, CFRE
Principal

www.whillconsulting.com



30-year career as a fundraiser, earning my stripes at big shops like Harvard, American Red Cross, National Trust for Historic Preservation

CFRE, AFP Master Trainer, Past President, AFP Washington Area Metro Chapter, Chair, Research Committee, Giving USA Foundation, Editorial Review Board, Giving USA Annual Report

Tailored 1:1 consulting on startups, major gifts, campaigns, assessments/studies, CEO/CDO coaching, and board training.

What We'll Learn Today...



What
matters to
donors and
how that
affects their
giving



How to
prepare for an
ask at scale
and on 1:1 level



Ways to
create
engagement
to inspire
sustained (and
increased)
giving

Understand Donors' Drivers



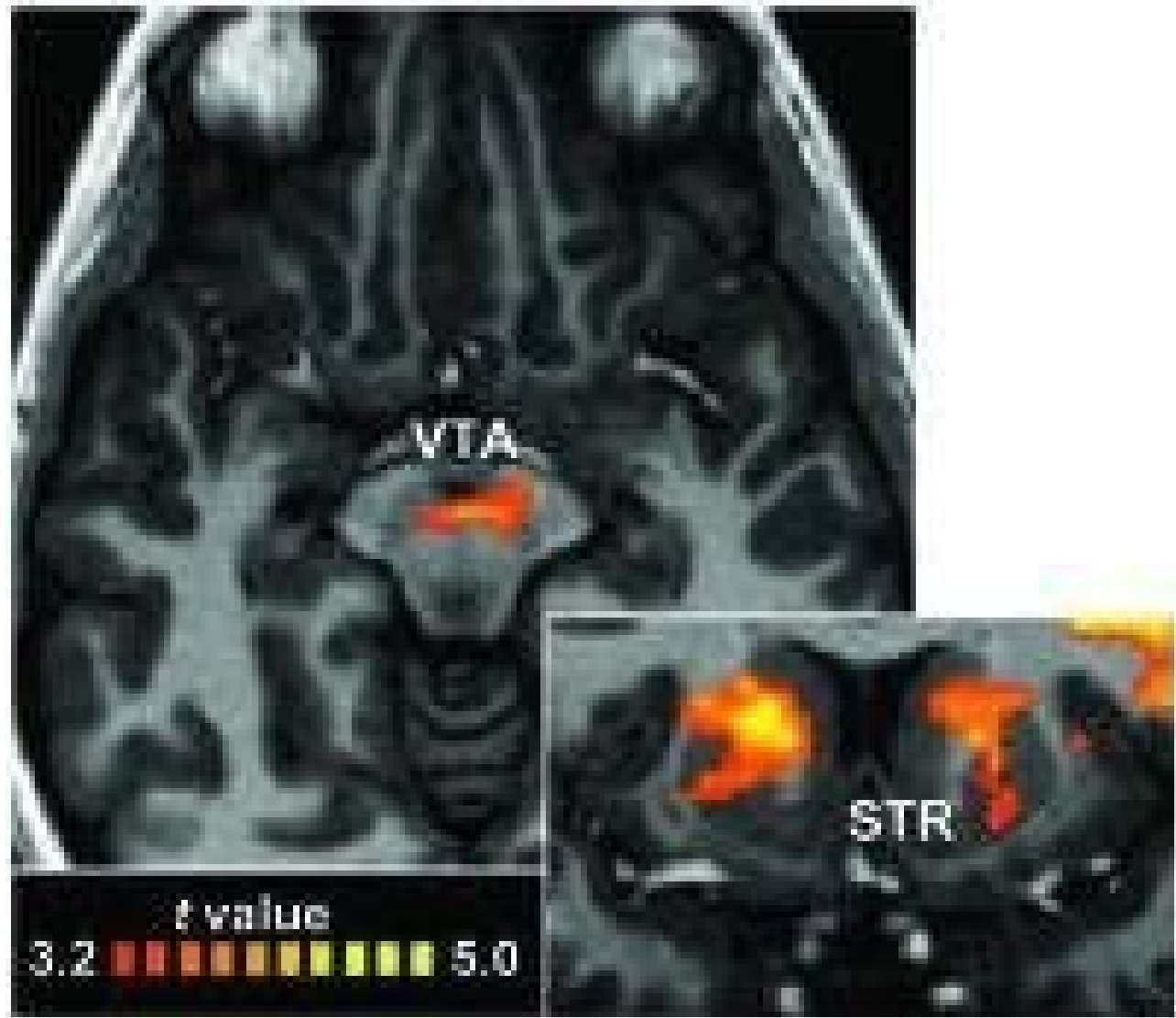
“Your generous donation,” said the Dodo, “will help us in our quest to find a cure for extinction.”

Why Do Donors Give?



Source: 2016 U.S. Trust® Study of High Net Worth Philanthropy

The Science Behind Giving



Charitable giving is rewarding (like receiving money)



But uniquely involves oxytocin-rich social attachment brain regions (used in maternal and romantic love)



Philanthropy is a “social act” using the mechanisms of FAMILY bonding—we create a “synthetic family” with other donors.

The Link Between Charity, Happiness, & Health



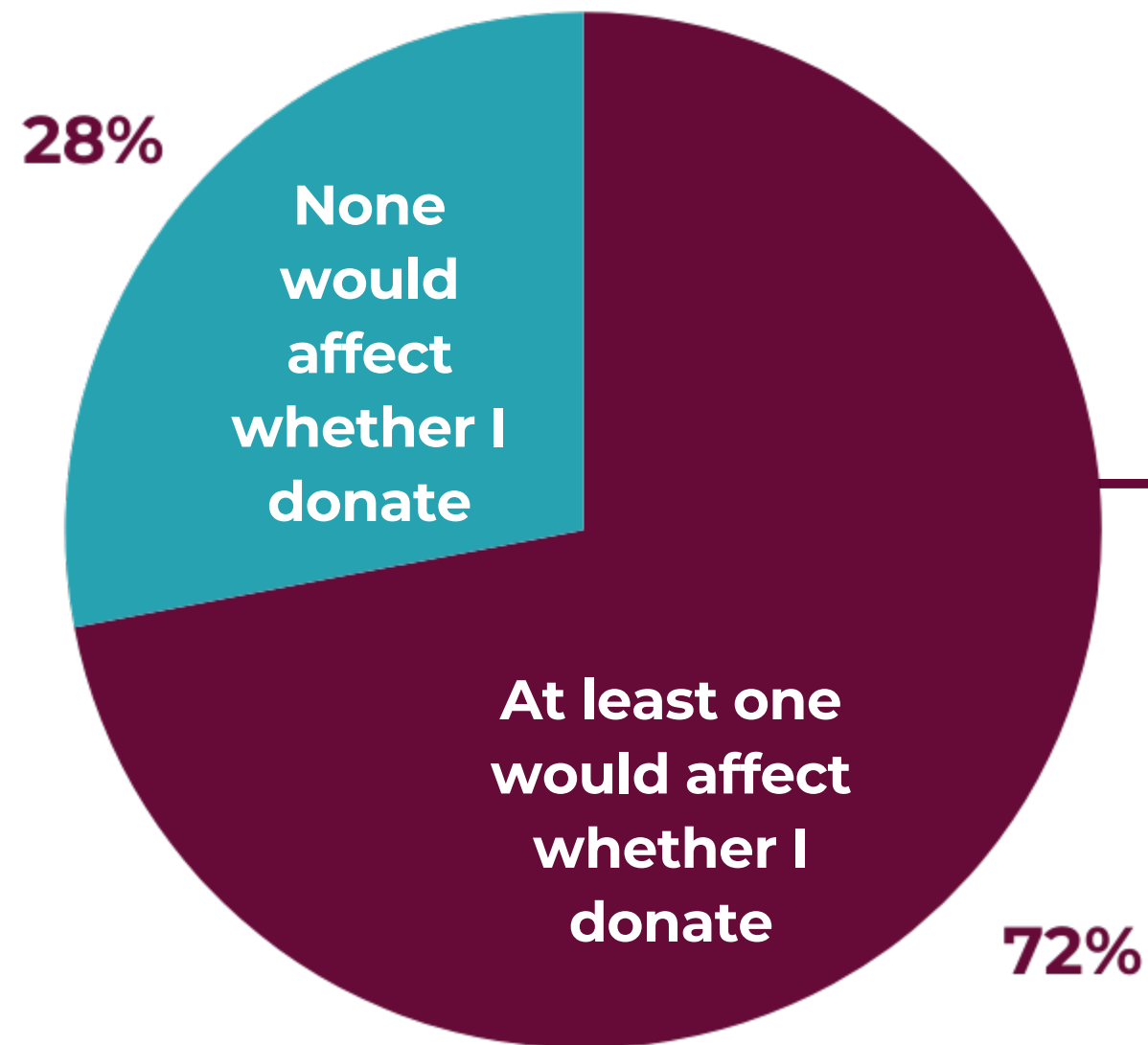
People who made a philanthropic gift were 43% more likely to say they were “very happy” compared to those who did not make a gift.

Similarly, volunteers were 42% more likely to say they felt “very happy.” While non-volunteers stated they were “not happy at all.”

Donors were 25% more likely to say their health was “excellent” or “very good” while non-donors were twice as likely to say their health was “poor or fair.”

Why Do Donors Stop Giving?

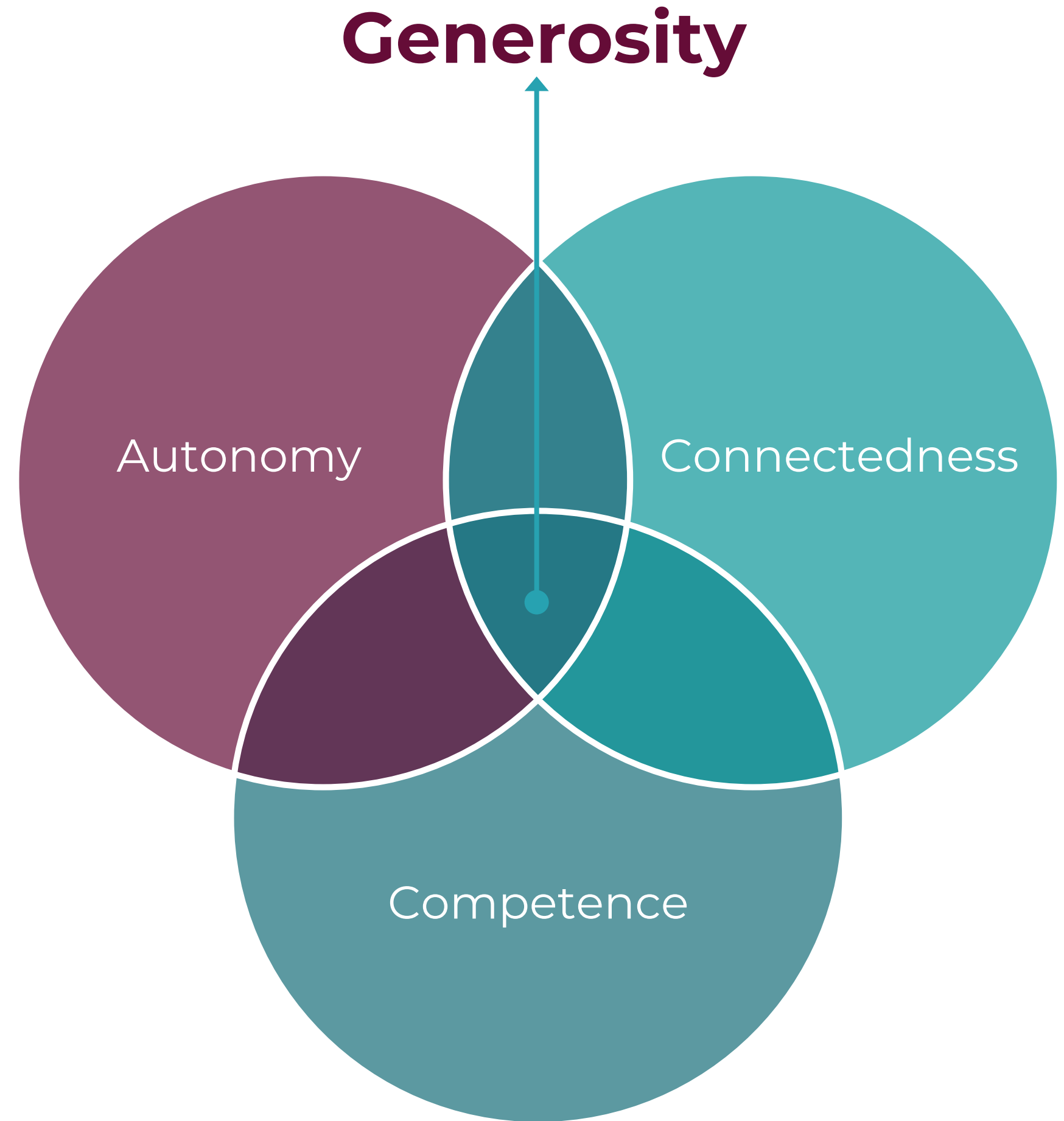
I would stop donating if content is ...



- 35% Too vague
- 25% About programs I'm uninterested in
- 24% Dull and boring
- 24% Has incorrect info about me
- 19% In an inconvenient format
- 14% Not suited to my region
- 12% Not suited to my age
- 10% Isn't personalized

Source: 2018 Abila Donor Loyalty Study

The Greatest Drivers for Generosity



Ideal Self

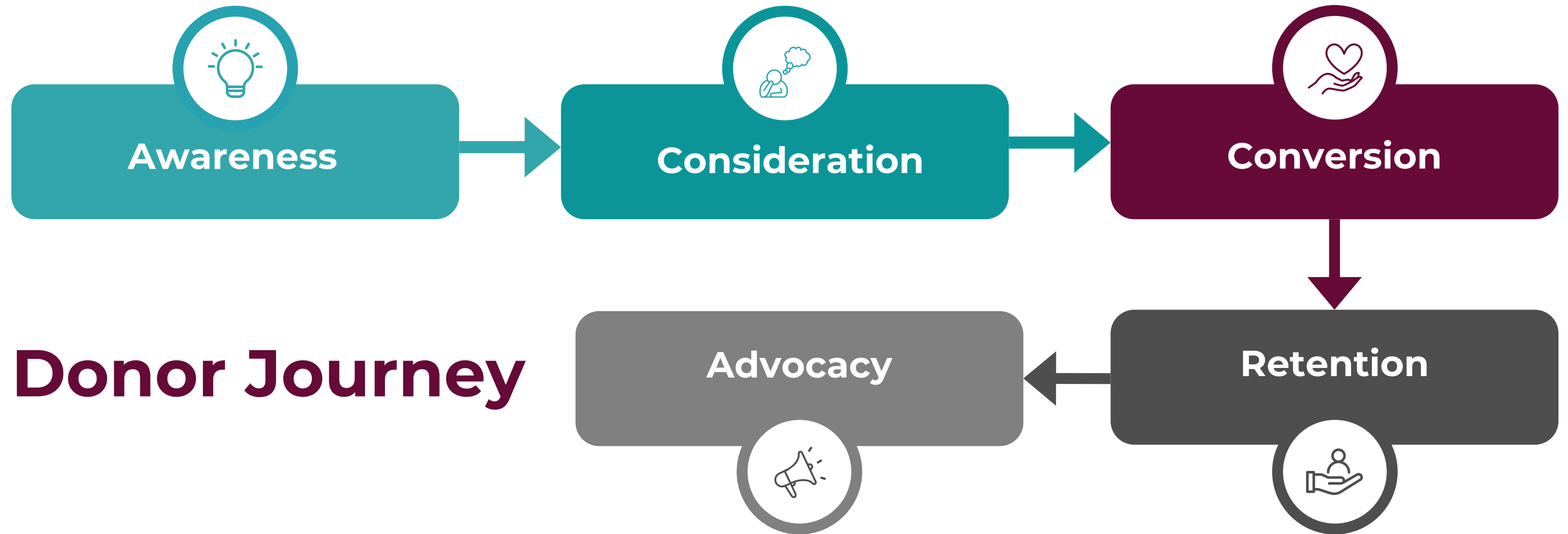
Who we realize we are meant to be (generous, kind, compassionate, activist, etc.) drives the actions we take to become our ideal selves.



Build Toward An Ask

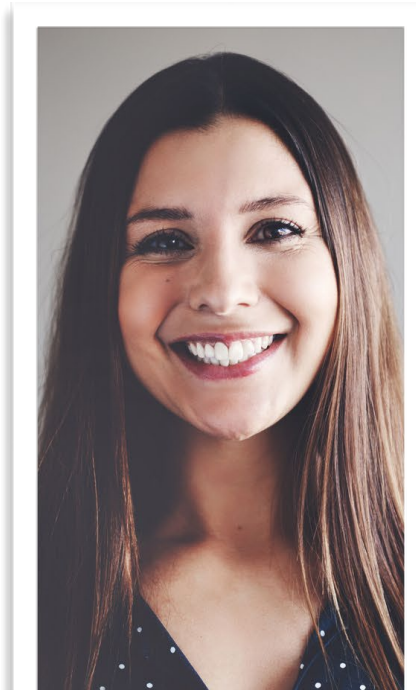
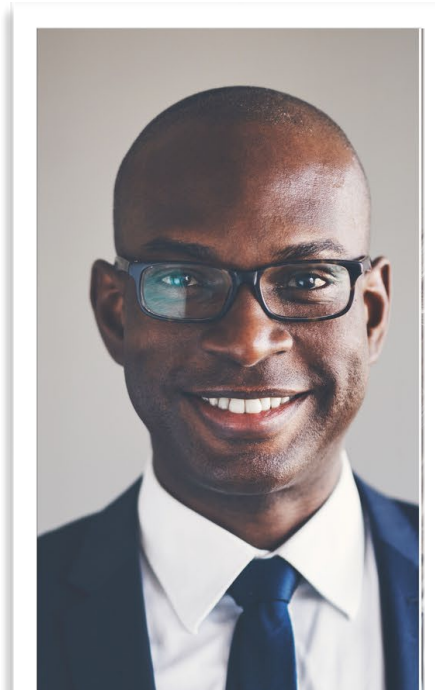
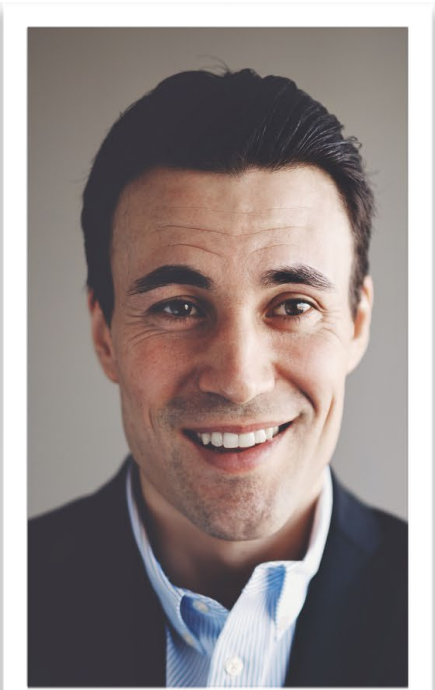


STRESSED - OUT BY A GRANT DEADLINE,
CARL SOOTHES HIMSELF BY CALLING THE
'DEVELOPMENT DIRECTORS FANTASY HOTLINE.'



Donor Journey

Who's Investing In You?



1

Current Donors

- Largest over their lifetime as donors
- Longest donors
- Lower-level donors who have deeper capacity

2

New Donors

- Largest New donors
- Potential capacity
- Passion for organization

3

Lapsed Donors

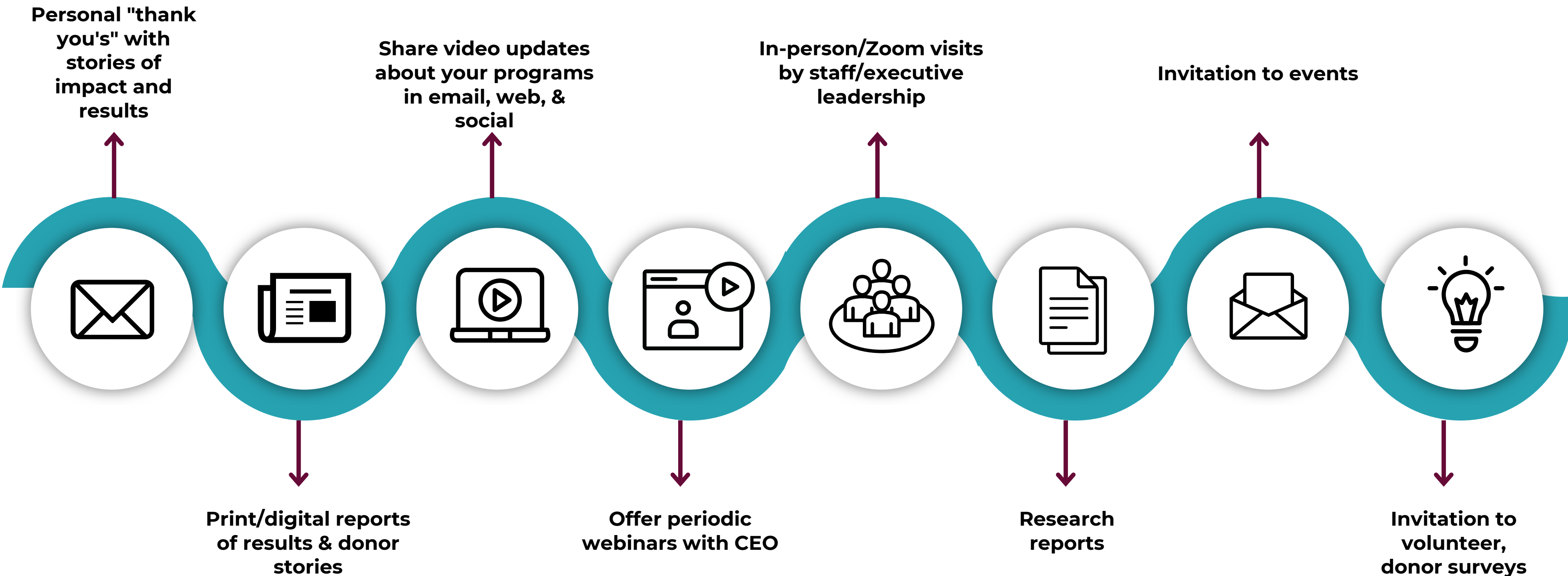
- Length of giving
- Cumulative Giving to you
- Screened capacity

Why Do They Give to YOU?

Survey Regularly

- Why Us? Why is this cause important to you?
- How Was It Making A Gift?
- What Do You Expect As A Donor?
- What Would You Like To Learn About Us?

Multichannel Meets Your Donor Where They Are



Avoid Weitis*



h/t Tom Ahern

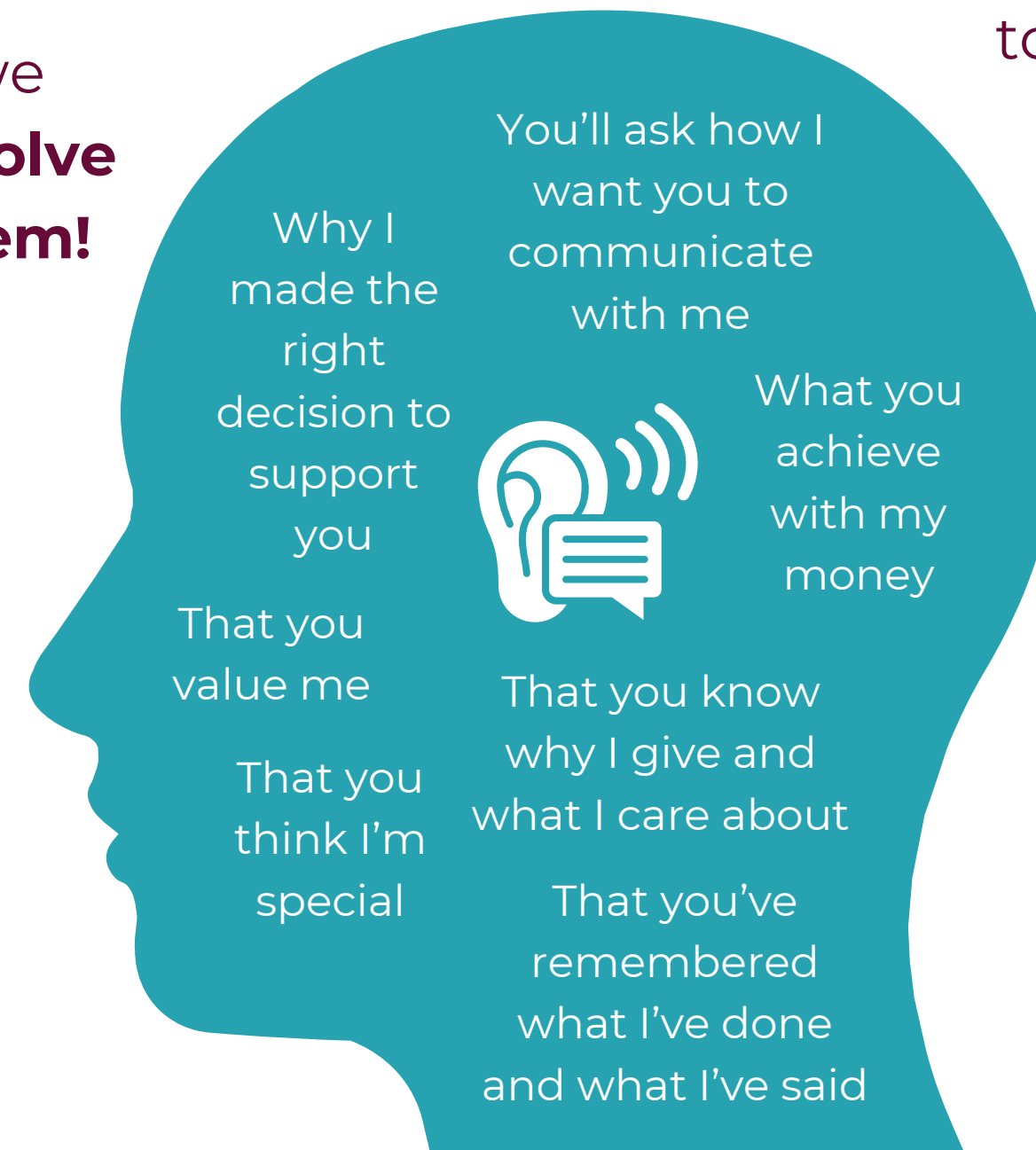
It's About **Their** Values

Things Charities
want to **TELL**
Donors



How we
helped **solve**
a problem!

Things Donors want
to **HEAR** from
Charities



It starts with the language we use

How do our donors feel when they read our communications or visit our website?

Are You Stoking the Warm Glow From Their Gift?

December 13, 2021

[REDACTED]

Dear [REDACTED] and [REDACTED]:

The Board of Trustees of the [REDACTED] Foundation joins me in thanking you for your recent donation of [REDACTED] made on Tuesday, December 7, 2021 which has been applied to a 2022 membership. *The Foundation confirms that no goods or services were received by you in consideration of this gift.*

We hope that Foundation-owned open spaces are currently a regular and important part of your New Year's plans. Whether it's enjoying the magic of the [REDACTED] a visit to [REDACTED] a hike through [REDACTED] or catching a glimpse of the [REDACTED] you drive by, take pride that you're helping protect 9,000 acres island-wide which are open to responsible users, year-round.

Your willingness to voluntarily support the ongoing nonprofit effort that safeguards, manages and maintains [REDACTED] rare resources, natural beauty and specialness is greatly appreciated. Enclosed is a [REDACTED] member decal and recently revised properties map. They are sent to you together with our heartfelt thanks for your annual membership support.

Sincerely,

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

President & CEO

P.S. Be sure to download our free mobile app [REDACTED] on the Google Play or App Store for trail maps, event information and more!

The [REDACTED] Foundation, Inc., established in 1963, is a qualified 501(c)(3) nonprofit corporation. Contributions to it are deductible to the full extent of applicable tax regulations.

Or Squashing the Spark?

[REDACTED]

[REDACTED]

2021 CONTRIBUTION SUMMARY

THANK YOU SO MUCH FOR YOUR SUPPORT!
Please retain this portion of the document for your records.

The following information outlines your 2021 tax-deductible contributions. We know that there are many worthy causes asking for your support, and we are honored by the trust you have placed in us.

Contribution Dates	Contribution Summary
1/1/2021-12/31/2021	[REDACTED]
2021 Tax Deduction	[REDACTED]

No goods or services were received in exchange for your contribution(s).

Or Are You Tapping Into Their Core Needs?



\$10 today doesn't buy miracles but it buys Tony time to get his childhood back and become a miraculous adult like you.

Competence

Thank you, in Tony's name, for being a part of his story and a friend of Autism Voice, donating to fight autism!

**Autonomy,
Competence,
Connectedness**

**Fundraising under-performance,
therefore, is actually a failure to
communicate."**

Penelope **Burk**, Donor-Centered Fundraising



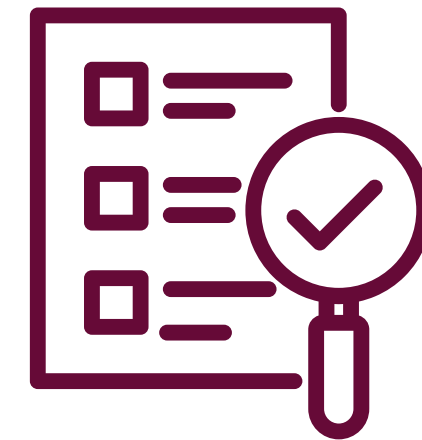
Build A Plan for Meaningful Donor Communications



Prompt, meaningful
gift acknowledgment



Designation of gift to a
program, service or
project more narrow in
scope than the charity's
overall mandate



Measurable results
on the last gift before
being asked for
another one

Regular Multi-Channel Fundraising Builds Donor Engagement



PRINT

Direct Mail
and
Newsletters



E-COMMUNICATIONS

Mobile / Online
E-newsletters, e-appeals,
videos



IN PERSON

Site visits, 1:1
meetings, cultivation
events

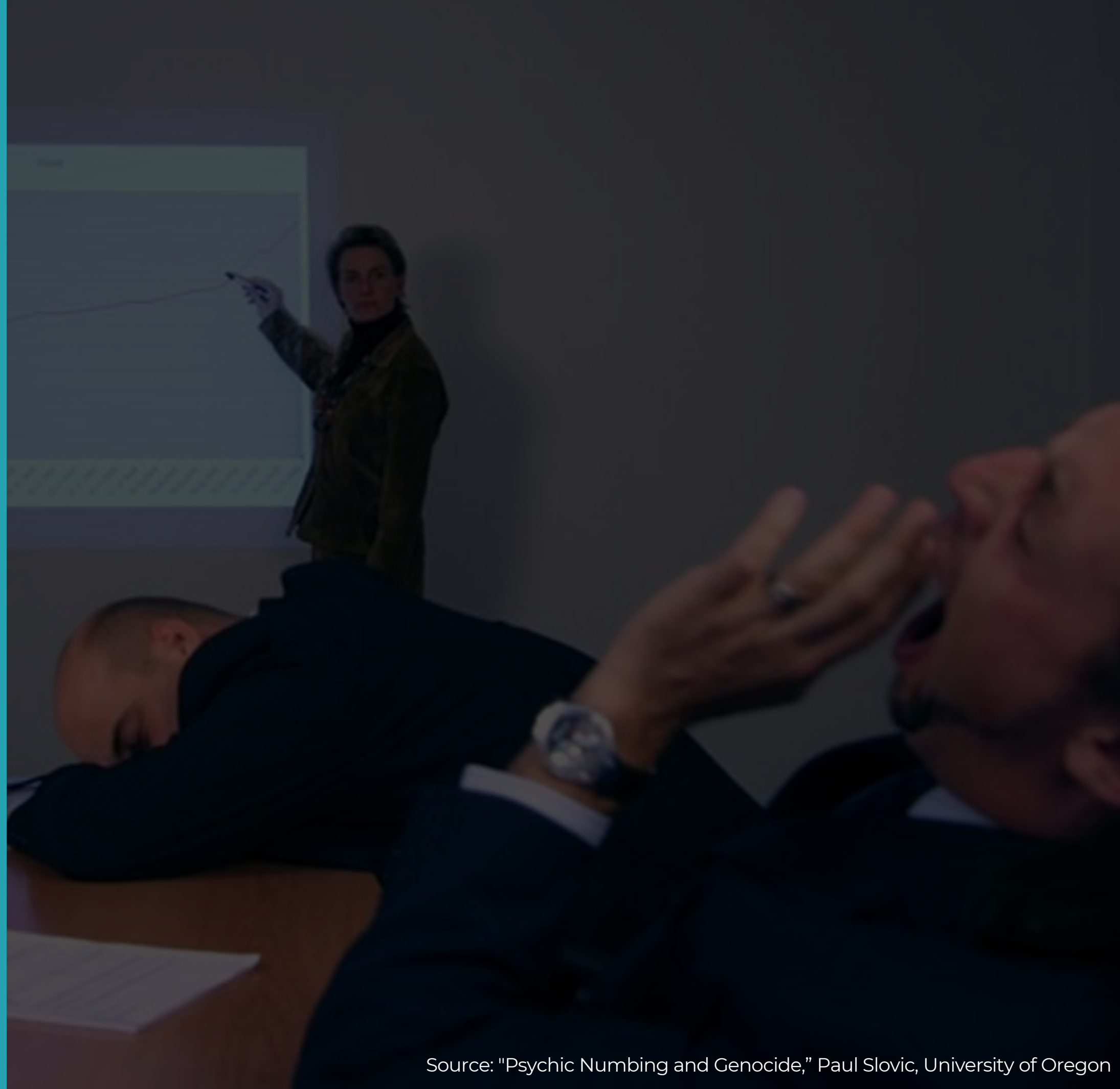


SOCIAL MEDIA

Facebook, Instagram,
Google all accept donations

Your story from the perspective of your audience's
values and what's important to them.

**Giving drops
up to 50%
when
statistics enter
the picture.**



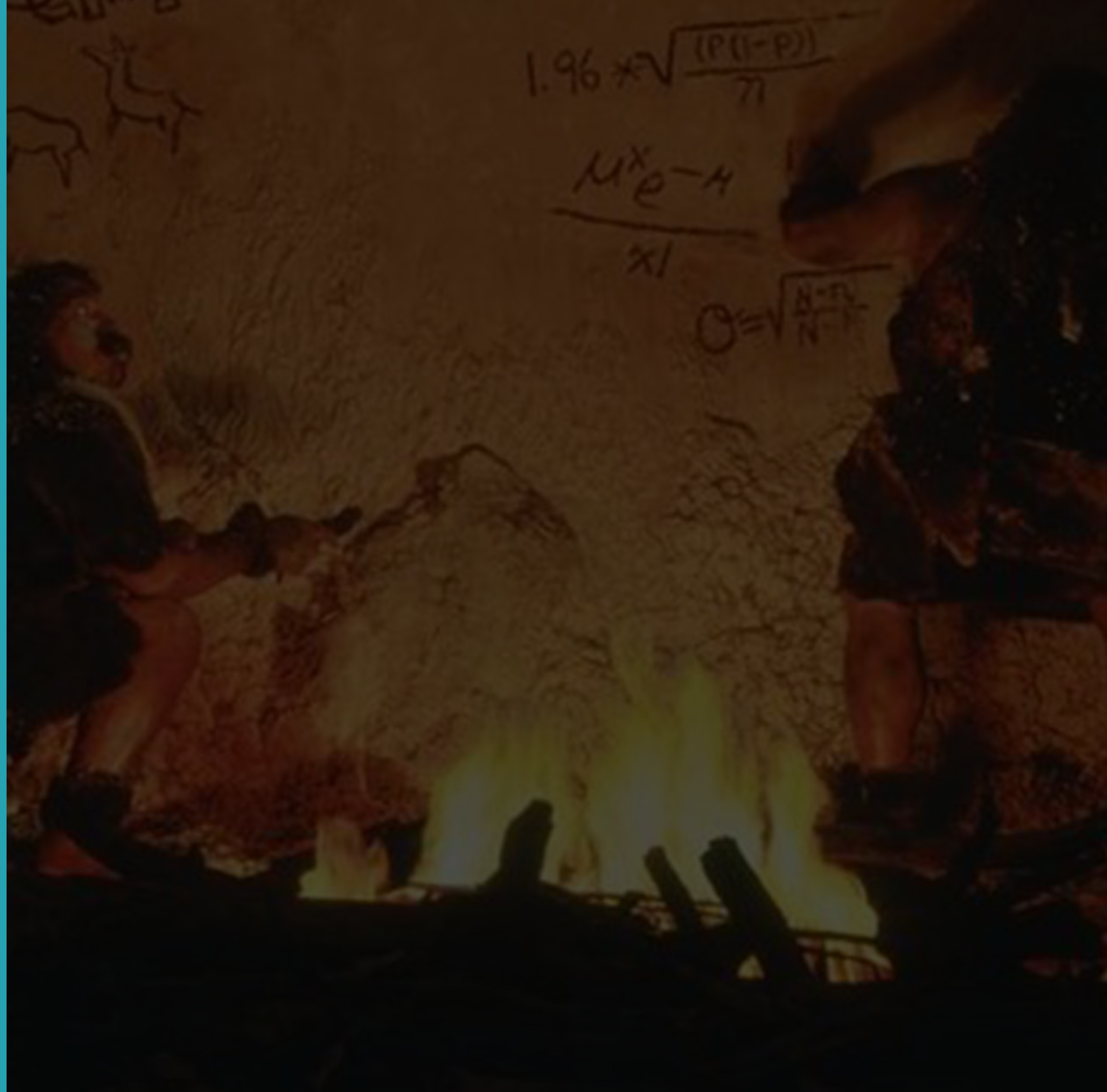
**“We rely on data
to tell us what has
happened, and
stories to tell us
what it means.”**

DataStory
NANCY DUARTE



Windmill Hill
CONSULTING

Use Stories to Show Impact







Mrs Personalised
1 Sample Street
Sampletown
Sampleshire
AB12 3 CD



**When you buy a street child
an emergency gift this Easter,
you can help them escape
the streets for good**

Dear Mrs Personalised,

Buying a gift for a street child <<such as the birth certificate you gave in response to Toybox's BBC Radio 4 appeal in November>> is, to my mind, the kindest and most heartfelt gift you can buy another person.

I say that because children living on the streets don't expect people to help them. They are used to being abandoned, abused and exploited. In fact, a gift from you is often the first act of kindness a street child has ever known.

But your gifts are much more than just acts of kindness. Your gifts transform real children's lives in the face of the most terrible adversity.

This Easter, please could you find it in your heart to help street children once more? Our outreach teams desperately need new funds to give children the basics they need to survive - items such as warm blankets, food packages and hygiene kits. What's more, your gift today - far from being a short-term solution - could also lead to a child escaping the streets for good.

Please will you buy an emergency gift for a vulnerable child this Easter?

Street children have complex needs, as I'm sure you can imagine. But by far the most urgent is their need to survive. Life on the streets is deadly, and life-expectancy for the children who live this way is tragically short.

These children are denied their basic human rights every day. Right now, many will be freezing cold, and at risk of disease. Many more will be without healthcare, warm bedding or clean

Please turn over ...

Answer the question: So what?

1. Tell the before and after **because** of your organization (and donors' support).
2. Share stories of **ONE**--make it relatable to the reader.
3. Leave the story **unfinished**--what else does your organization need to do that the donor can help you achieve?



Dear [REDACTED]

My name is Carson and I want to let you know how much your loyal support of Best Buddies means to me and my buddy, Jeremiah.

Since we met three years ago, Jeremiah has shown me what a true friend is. Through eating together and going to dances and football games at our school, as well as attending other social events in our community, Jeremiah and I have become more than great friends. *He is like a brother to me.*

It is an amazing feeling to know that just spending a few hours out of my day with Jeremiah has been life-changing for him, and for me, too. Your loyal support of Best Buddies makes more friendships like ours possible!

THANK YOU SO MUCH!

Carson Canfield
Jeremiah's peer buddy



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Set the Stage for Transformational Gifts



If you build it he will come.

PLANET 501C3 TALES FROM THE NONPROFIT GALAXY BY MIRIAM ENGELBERG

FAIRY TALES FOR BOARD MEMBERS





Your “Major” Donors Are

ACCESS

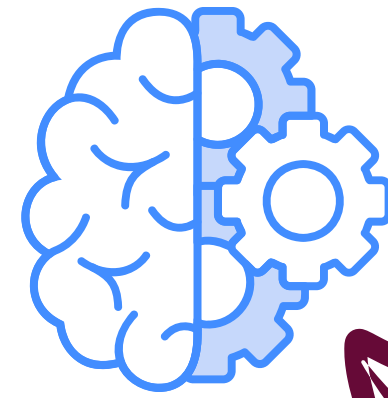
Does this person have a relationship to you or other board members, staff, donors, others related to you?

BELIEF

Does this person genuinely care about your mission?
Is this person historically philanthropic toward similar causes?

CAPACITY

Does this person have the financial ability and/or networks of those who can support you at a significant level?



Reason

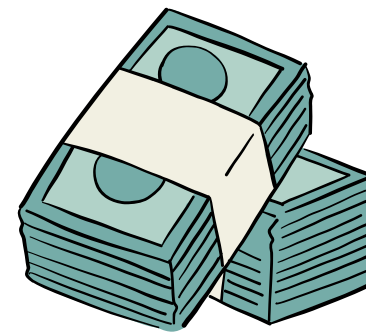


Person

Right



Way



Amount



Time

Transformational Giving Is About Depth Not Breadth

High performers ask with confidence **because they understand the donor's connection and motivations. They engage the donor properly over time, acting as their guide, providing real value and a 'VIP' donor experience.** In that way, the top 20% play their role properly as the Sage who helps complete the story. As a result, they make foolproof asks.

–Russell James, PhD

**What is your big,
bold vision for the
organization and
what do you need
to realize it?**



This was not textbook ideal donor at first...

- Disengaged...she had not been involved for at least a decade
- No sense of her gift capacity–assumed she was not HNWI
- The organization was unsure how to involve her

And then we had lunch...



“We just never dreamed this big..”



Lessons Learned

- Big gifts come from big dreams and often take time to develop.
- Don't assume someone who's been disconnected isn't interested AND doesn't have resources for a large gift.
- Be courageous to share dreams that seem wildly impossible AND half-baked plans to reach those dreams.



Recipe for Successful Large Gift Solicitations

Personalization

Strong
Relationship

Urgency and
Timing

Confidence
and Flexibility
in the Ask

Leadership
Involvement

Peer Influence

Recognition
Preferences

Alignment with
Personal
Values

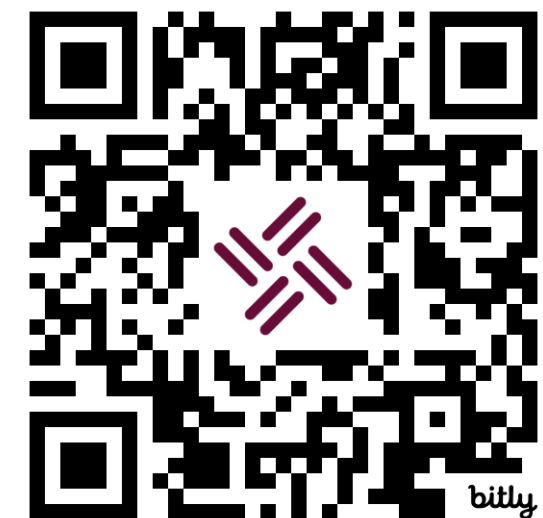
Legacy

Trust and
Transparency

Personal
Involvement

Impact

**Download Your Own Recipe
for Major Gifts**



One-on-One Visits
with a Board
member and/or
ED or CEO

Thank you calls from
staff/Board/ED or CEO

Inclusion of staff visits
with prospects and
donors

Site
Visits

Engage and Inspire

Quarterly in-person
or teleconference
updates with CEO
or ED

Continued invitations
to established events
with strong follow-up

Opportunities to ask for
advice (market study,
focus groups, surveys)

Small
cultivation
events

Prioritize Your Donors to Close Year-End Gifts

1. Last Year Not Yet This Year Donors

- Who hasn't yet made their gift this year but supported you last year?

2. Current/New Donors

- Are there any additional gifts you can secure?

3. Inactive Donors

- Any donors who gave to you 2 years ago to try to reach?

4. Current and Past Board/Current and Past Volunteers

Recap

- Whether you are asking at scale (through direct mail or e-appeals) the same conditions need to be in place.
- Evaluate your current donor journey.
 - Where can you create meaningful connection through the language you use and the activities to create community?
- Remember that major gifts result from relationships built over time and that align with donors' interests.
- Use Year-End as **one part** of a longer cycle of engagement and learning about your donor audience.

Let's Stay Connected



Connect with us/Follow us

Get on the waitlist for our
MasterMind Coaching Cohort

