Storyliving® is about engaging the donor to write their own story with you and your organization.
Once upon a time ..........

SEVEN FACES OF PHILANTHROPY
SOCIAL SCIENCE STUDY
By Russ Alan Prince & Karen Maru File
DONOR TRAITS BY PERSONA

• What’s their philanthropic point of view?
• How do they select a nonprofit?
• What are their stewardship preferences?
• What are their recognition preferences?
• How do we guide donor development based on their preferences?
• How do we co-author the donor’s story with them?

ALL 7 DONOR PERSONA PERSPECTIVES AT-A-GLANCE

1. COMMUNITARIAN / DO-GOODER: 26% - Doing good makes sense
2. DEVOUT: 21% - Doing good is God’s will
3. INVESTOR: 15% - Doing good is good business
4. SOCIALITE / THE CLUB: 11% - Doing good is fun
5. REPAYER: 10% - Doing good in return
6. ALTRUIST: 9% - Doing good feels right
7. DYNAST / LEGACY: 8% - Doing good is a family tradition
### COMMON QUESTIONS & PHRASES BY DONOR PERSONA

#### COMMUNITARIAN / DO-GOODER:
- That makes sense
- Do you collaborate w/ other NPOs?
- Every (blank) deserves…
- We have to do something about…
- If our gift will help you motive others…

#### SOCIALITE / THE CLUB:
- That should be fun!
- What does everyone else think?
- Who else will be involved?
- Can I bring (friend)?
- I’d like to get a group involved

#### DYNAST / LEGACY:
- CEO / Leadership quality questions
- I’d like to share your (blank) with my advisor
- We’ll need to approve any public recognition
- Don’t spend too much time on this, but…
- Send me your gift agreement for review

#### INVESTOR:
- How will you leverage my gift to…
- Who manages your investments?
- How’s your five to ten year growth been?
- Who are your largest supporters?
- What return on investment do you expect?

#### DEVOUT:
- I believe it’s everyone’s responsibility…
- We are called to…
- Any reference to moral obligation or tithing
- Any reference to faith
- I prefer to be publicly anonymous

#### REPAYER:
- I want to give back
- Someone made a difference for me…
- It’s the least I can do
- I was blessed, and now I want to…
- I want to be a role-model…

#### ALTRUIST:
- I wish to be totally anonymous
- This (charitable work) is my life’s purpose
- To whom much is given…
- I want to be in the background
- I can’t imagine what it must be like…
CREATING MAJOR DONOR STORYLIVING TRACKS

Consider the following questions:

1. How does your organization’s work resonate with this donor’s beliefs and values?
2. How will you demonstrate the measurable impact of your work to this donor?
3. How will you demonstrate the community need to this donor?
4. How can this donor experience your work in their specific area of interest?
5. Does this track honor the donor’s preferences and decision-making process?
6. Beyond money, how could this donor contribute to the solution?
7. Are you open to collaboration with the donor?
8. What stewardship and recognition will you propose for this donor persona?

SOCIALITE
AKA THE CLUB

- Represents 11% of major donors
- Doing good is fun!
- Selects causes “approved” by their social network
- Hands-on, requires prompt and specialized attention after the gift is made; want to be kept “in the know”
- Loves public acknowledgement and formal recognition
SOCIALITE CASE STUDY: TAU BETA ASSOCIATION

2004 - 2012 Engagement with The Children’s Center

- Annual gift ranging from $50,000 to $80,000
- Volunteerism largely focused on “clothing closet” donation management
- Center for Discovery homework help for older children
- Foster Care independent living household goods drives and distribution
- Tau Beta leadership questioning the impact of their investment
- At risk of losing Tau Beta Association support

2013 - 2015 Engagement with The Children’s Center

- Courageous conversation with Tau Beta leadership
- Conducted a membership wide survey
- Shifted volunteerism focus to early childhood education
- Created the Tau Beta Center for Family Literacy
- Monthly “Read with Me” program volunteers
- New focus on school supplies, backpacks and book drives
- Designated a TCC staff relationship manager
- Annual stewardship report is presented at annual meeting
- Has received the annual Lisa V. Ford Heart & Soul Volunteer Award
- Tau Beta President invited to annual AutoGlow Gala Honorary Committee
- Annual gift range increased to $100,000 - $125,000
SOCIALITE CASE STUDY: TAU BETA ASSOCIATION

Evie Ricci
“Read with Me” Memorial Rocking Chair
August 8th, 2014

Evie Ricci’s daughters & sister
SOCIALITE PERSONA TRAITS: TAU BETA ASSOCIATION

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THE CHILDREN’S CENTER STORY
IS THE TAU BETA STORY

DYNAST
AKA FAMILY LEGACY

- Represents 8% of major donors
- Doing good is a family tradition
- Highly cautious when selecting nonprofit partners, often engaging advisors in the process
- Generally “hands-off” after the gift is made, merely requiring any agreed upon impact reporting if applicable
- Expects nonprofits to focus on their missions, not catering to them
DYNAST / LEGACY CASE STUDY: RALPH C. WILSON, JR. FOUNDATION

2010 - 2012 Engagement with The Children’s Center

- Annual gift of $10,000 restricted to Crisis Care Center
- No stewardship reporting requested or provided
- No tour of Crisis Care Center
- No stories about children served through Crisis Care services
- Friendly, but largely transactional relationship secured through board member connections
DYNAST / LEGACY CASE STUDY: RALPH C. WILSON, JR. FOUNDATION

2013 - 2014 Engagement with The Children’s Center

- Detailed annual stewardship report (not required)
  - 2014: Support for 14 of 479 children CCC served
  - 80% Hospitalization diversion rate
  - Saving $800K+ in public support
- Live testimonial from Coty’s parents
- Annual gift of $20,000 restricted to Crisis Care Center

DYNAST / LEGACY CASE STUDY: RALPH C. WILSON, JR. FOUNDATION

- March 25, 2014 - Mr. Wilson passes away, age 95
- NFL Buffalo Bills franchise sells for $1.4B to grow family foundation
- Ralph C. Wilson, Jr. Foundation becomes 2nd largest private foundation in U.S.
- Private tour of Crisis Care Center for Wilson Family & Foundation Staff
- The Children’s Center receives $525,000 to create a named endowment for children in crisis
DYNAST PERSONA TRAITS: RALPH C. WILSON, JR. FOUNDATION

✓ Doing good is a family tradition.
✓ Highly cautious when selecting nonprofit partners, often engaging advisors in the process.
✓ Generally “hands-off” after the gift is made, merely requiring agreed upon impact reporting.
✓ Expects nonprofits to focus on their missions, not catering to them.

THE CHILDREN’S CENTER CRISIS CARE STORY IS THE WILSON FAMILY’S STORY

COMMUNITARIAN AKA DO-GOODER

• Represents 26% of major donors
• Doing good makes sense
• Organizational effectiveness is their #1 selection criteria
• Prefers restricted giving and measurable impact reporting
• Individualized attention and public recognition among key groups
DO-GOODER / COMMUNITARIAN CASE STUDY: GENERAL MOTORS

Greater Detroit 2006 - 2010 stats:

- Population 2.5M to 917,000
- City of Detroit 1 in 3 homes in foreclosure
- City of Detroit 30% unemployment
- 1 in 5 people in food crisis
- 30 high school “dropout factories”
- GM & Chrysler in bankruptcy 2009-10
- City of Detroit $18B in debt

Mark Reuss, President General Motors North America - 2010
DO-GOODER / COMMUNITARIAN CASE STUDY:

United Way for Southeastern Michigan is finding people and organizations with expertise, resources and passion to join us in Making Greater Detroit one of the top five places to live and work by 2030.

“We must have the courage to put a stake in the ground in our communities, to set audacious goals and to bet a great majority of people will join us.”

— Rick Vanoorswijk, Vanoorswijk Institute for Public Innovation

DO-GOODER CASE STUDY: GENERAL MOTORS GIVES $27.1M

GM banks on Detroit kids
DO-GOODER / COMMUNITARIAN CASE STUDY: GENERAL MOTORS

teamGM Cares Volunteer Corp is created

teamGM Cares Committee Champions
DO-GOODER / COMMUNITARIAN CASE STUDY: GENERAL MOTORS

Employee Volunteer Paid Time Off Program Launches

Corporate food drives and distribution events
DO-GOADER / COMMUNITARIAN CASE STUDY: GENERAL MOTORS

Back-to-School school supply and backpack drives

Transforming urban blight into urban gardens
DO-GOOFER / COMMUNITARIAN CASE STUDY: GENERAL MOTORS

GM Student Corps launches

Network of Excellence campus clean up projects
DO-GOODER / COMMUNITARIAN CASE STUDY: GENERAL MOTORS

GM Student Corps Mentorship Program

GM Student Corps
DO-GOODER / COMMUNITARIAN CASE STUDY: GENERAL MOTORS

- Highest US Corporate Honor
- $27.1M Foundation Investment
- $5.8M Employee Giving
- 1,200 Employee Service Hours
- 110 Summer Internships Annually
- 100 Buick Scholarships Annually
- National Groundhog’s Day Job Shadowing - 500 Students

General Motors Receives United Way Worldwide US Summit Award 2012

86%
GENERAL MOTORS NETWORK OF EXCELLENCE CLASS OF 2013 Graduation Rate

“Much Love” Kymoni with his son and grandmother
DO-GOODER / COMMUNITARIAN CASE STUDY: GENERAL MOTORS

THE UNITED WAY’S HIGHSCHOOL TURNAROUND STORY
IS THE GENERAL MOTORS STORY
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DONOR QUESTIONS FOR DISTINGUISHING PERSONAS

1. Tell me about your most meaningful giving experience.
2. What attributes do you look for when evaluating a nonprofit?
3. Who else is typically involved in your charitable evaluation?
4. What’s the most special way you’ve ever been thanked for making a gift?
5. When it comes to nonprofit organizations, who does it best and why?
6. What are your needs and expectations after a gift is made?
7. What inspires your loyalty to a nonprofit organization?
8. What do you want to accomplish through your giving?

Your turn to practice identifying donor personas:

• Pair with person next to you.
• Review and embody your “secret” persona (1 Minute)
• Decide who is “A” and who is “B” in your pair.
• Person A begins asking discovery questions (2 Minutes)
• Person B will answer questions in your assigned persona
• Tammy will say STOP
• Person A guess person B’s persona
• SWITCH & REPEAT (2 Minutes)
HOW TO GET STARTED IDENTIFYING MAJOR DONOR PERSONAS

1. List your top 20 donors.
2. Match them to their likely persona using the traits, phrases and questions presented.
3. Consider meeting 1:1 with these donors to thank and update them, and learn more using the persona discovery questions on the previous slide.
4. Understanding their motivations and preferences, identify next steps to guide the development of your donor’s most meaningful story.
5. Identify your organization’s top 3 donor persona styles, build and implement those major donor Storyliving tracks.

Storyliving® for Advocacy

Elected Officials: Where Communitarian Meets Investor
WHAT’S THE PROBLEM?

Too many seniors in Florida are left behind, alone and hungry, struggling to stay independent and healthy.

- 1,138,250 are isolated, living alone
- 757,111 are threatened by hunger
- 1,559,775 are living in or near poverty

Nationally, 1 in 6 seniors struggles with hunger.

Meals on Wheels delivers the support that keeps seniors in their own homes, where they want to be.

- 81% say it improves their health
- 92% say it enables them to remain living at home
- 90% say it makes them feel more safe and secure
WHY SHOULD I CARE?

Storyliving® for Advocacy

SENIORS REMAINING AT HOME, OUT OF HOSPITALS AND NURSING HOMES, SAVES BILLIONS IN MEDICARE AND MEDICAID COSTS.

Meals on Wheels' clients report fewer falls, which cost our nation $31 BILLION each year.

We can provide a senior Meals on Wheels for 1 YEAR for roughly the same cost as 1 DAY in a hospital.

Investing in Meals on Wheels is a WIN-WIN for our seniors, our communities and our nation.

Visit www.mealsonthewheelsamerica.org/takeaction to learn more about how you can help in your state and community today.
HOW DO YOU HELP SOLVE THE PROBLEM?

A SENIOR WHO RECEIVES DAILY-DELIVERED MEALS EXPERIENCES THE GREATEST IMPROVEMENTS IN HEALTH AND QUALITY OF LIFE COMPARED TO A SENIOR WHO RECEIVES FROZEN, WEEKLY-DELIVERED MEALS OR NO MEALS AT ALL.

WHEN COMPARED WITH A SENIOR WHO RECEIVES JUST FROZEN MEALS ONLY ONCE A WEEK, A SENIOR WHO RECEIVES DAILY-DELIVERED MEALS IS MORE LIKELY TO:

- Attribute the meals to making them feel safer
- Report that the meals helped them to eat healthier
- Note that the meals resulted in less loneliness
“These people from Meals On Wheels – when they come every day, that’s the only person that comes to my door. To me, they’re like family. I wish they could stay a little longer.

- DELIA, Tampa Recipient
Storyliving® for Advocacy

THE DELIVERY ROUTE RIDE-ALONG

1. SECURING THE VISIT
2. PREPARING FOR THE VISIT
3. DURING THE VISIT
4. CLOSING THE VISIT & OPENING THE DOOR FOR ON-GOING RELATIONSHIP BUILDING

THE ULTIMATE STORYLIVING EXPERIENCE

HOW CAN I HELP?
WE’RE HAPPY YOU ASKED:

• Increase federal funding for OAA Nutrition Programs by $100M over FY2018 enacted levels, to a total of $996.7M for FY2019.
• Maintain existing funding levels for Social Services, Community Development and Community Block Grants in all FY2019 funding agreements.
• Protect and increase funding for all OAA programs and other nutrition programs that benefit seniors such as Commodity Supplemental Food Program (CSFP) and Supplemental Nutrition Assistance Program (SNAP).
Storyliving®

Tammy has been named among America’s Top 25 fundraising experts. She’s an envelope-pushing fundraising practitioner, an inspiring international speaker, and a powerful trainer in the discipline of transformational fundraising. In the past decade she has coached, trained and led nonprofit teams to raise more than $400M including a single gift of $27.1M. She moved to Detroit in 2008 with a calling to fundraise in the most challenging economy in the U.S. and has turned those experiences into strategies, tools and processes for creating transformational fundraising results in any economy. When she’s not speaking at conferences or fundraising, she’s leading webinars, e-courses, private workshops and retreats through her company - Fundraising Transformed or hosting an episode of ZTV on her Vimeo fundraising channel.

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www.tammyzonker.com