



PRESENTATION TITLE GOES HERE

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Storyliving®

Creating Transformational
Major Donor Experiences

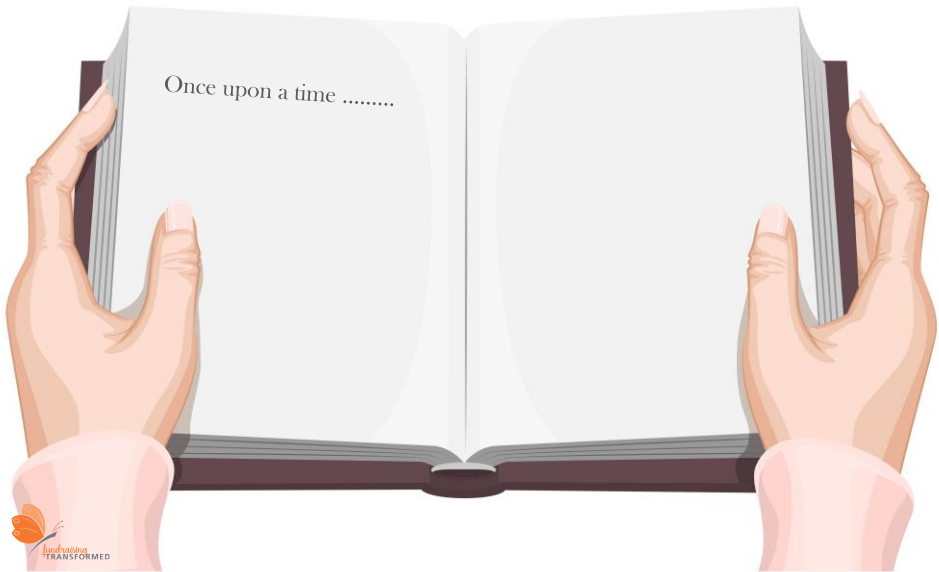


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Storyliving® is about engaging
the donor to write their own story
with you and your organization.



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MEALS + WHEELS AMERICA

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SEVEN FACES OF PHILANTHROPY

SOCIAL SCIENCE STUDY

By Russ Alan Prince & Karen Maru File



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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?**



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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



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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 motivate 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?



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COMMON QUESTIONS & PHRASES BY DONOR PERSONA

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



SOCIALITE CASE STUDY: TAU BETA ASSOCIATION

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



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SOCIALITE CASE STUDY: TAU BETA ASSOCIATION



Tau Beta Association President Barbara Lennox Kennedy at TCC Head Start Academy



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SOCIALITE CASE STUDY:
TAU BETA ASSOCIATION

Evie Ricci
“Read with Me”
Memorial Rocking Chair

August 8th, 2014

Evie Ricci's daughters & sister

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SOCIALITE PERSONA TRAITS: TAU BETA ASSOCIATION

- ✓ **Doing good is fun!**
- ✓ Selects causes “approved” by their social network.
- ✓ Hands-on, requires prompt and specialized attention after the gift is made.
- ✓ Wants to be kept “in the know.”
- ✓ Loves public acknowledgement and formal recognition.

THE CHILDREN’S CENTER STORY IS THE TAU BETA STORY



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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



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



Trustees Mrs. Ralph C. Wilson, Jr. & Ms. Mary Owen



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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



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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



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



Ralph C. Wilson, Jr., Buffalo Bills Owner

- 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



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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



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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



DO-GOODER / COMMUNITARIAN CASE STUDY: **GENERAL MOTORS**



Mark Reuss, President General Motors North America - 2010



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DO-GOODER / COMMUNITARIAN CASE STUDY:

United Way for Southeastern Michigan is inviting 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.

EARLY CHILDHOOD EDUCATION

Children are more likely to succeed in school when they have quality early childhood education.

REGIONAL STATISTICS

71% of children in the Detroit area are enrolled in early childhood education programs.

INCOME

Median \$18,000 household income in Southeastern Michigan.

REGIONAL STATISTICS

23% of households in the Southeastern Michigan region live in poverty.

BASIC NEEDS: FOOD INITIATIVE

Feeding hunger by year 2030.

REGIONAL STATISTICS

1 in 10 children in the Detroit area are at risk of going hungry.

HIGH SCHOOL TURNAROUND

Working high school students are leaving at a rate of 44%.

REGIONAL STATISTICS

Over 20 states now have high school dropout rates of 20% or higher.

Quote: "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 Harwood, Harwood Institute for Public Innovation



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



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DO-GOODER / COMMUNITARIAN CASE STUDY: **GENERAL MOTORS**



teamGM Cares Volunteer Corp is created

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DO-GOODER / COMMUNITARIAN CASE STUDY: **GENERAL MOTORS**



teamGM Cares Committee Champions

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DO-GOODER / COMMUNITARIAN CASE STUDY: **GENERAL MOTORS**



Employee Volunteer Paid Time Off Program Launches



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DO-GOODER / COMMUNITARIAN CASE STUDY: **GENERAL MOTORS**



Corporate food drives and distribution events



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DO-GOODER / COMMUNITARIAN CASE STUDY: **GENERAL MOTORS**



Back-to-School school supply and backpack drives



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DO-GOODER / COMMUNITARIAN CASE STUDY: **GENERAL MOTORS**



Transforming urban blight into urban gardens



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DO-GOODER / COMMUNITARIAN CASE STUDY: GENERAL MOTORS



Network of Excellence campus clean up projects



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DO-GOODER / COMMUNITARIAN CASE STUDY: GENERAL



GM Student Corps launches



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DO-GOODER / COMMUNITARIAN CASE STUDY: **GENERAL MOTORS**



GM Student Corps Mentorship Program



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DO-GOODER / COMMUNITARIAN CASE STUDY: **GENERAL MOTORS**



GM Student Corps



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DO-GOODER / COMMUNITARIAN CASE STUDY: **GENERAL MOTORS**



UWW President Brian Gallagher & GM Foundation President Vivian Pickard

- 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



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DO-GOODER / COMMUNITARIAN CASE STUDY: **GENERAL MOTORS**



"Much Love" Kymoni with his son and grandmother

86%

GENERAL MOTORS
NETWORK OF
EXCELLENCE
CLASS OF 2013
Graduation Rate

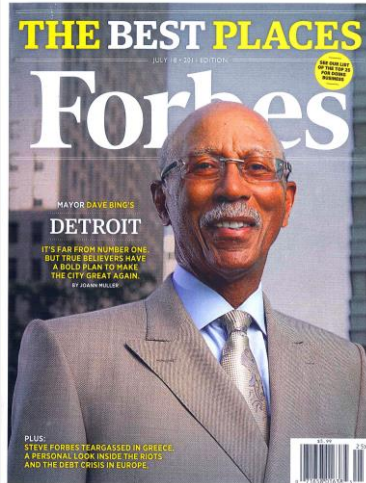


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DO-GOODER / COMMUNITARIAN CASE STUDY: **GENERAL MOTORS**



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DO-GOODER / COMMUNITARIAN PERSONA TRAITS: **GENERAL MOTORS**

- ✓ **Doing good makes sense.**
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**THE UNITED WAY'S HIGH SCHOOL TURNAROUND STORY
IS THE GENERAL MOTORS STORY**



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COMMON QUESTIONS & PHRASES BY DONOR PERSONA

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ALTRUIST:

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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?



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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)



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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.



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Elected Officials: Where Communitarian Meets Investor



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WHAT'S THE PROBLEM?



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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

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WHY SHOULD I CARE?



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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.mealsonwheelsamerica.org/takeaction to learn more about how you can help in your state and community today.



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HOW DO YOU HELP SOLVE THE PROBLEM?



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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

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*“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



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THE DELIVERY ROUTE RIDE-ALONG



THE ULTIMATE STORYLIVING EXPERIENCE



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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



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HOW CAN I HELP?



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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).



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MEALS ON WHEELS AMERICA ADVOCACY RESOURCES:

Crystal Espie

Senior Manager, Advocacy and Engagement

Direct: 571.339.1613

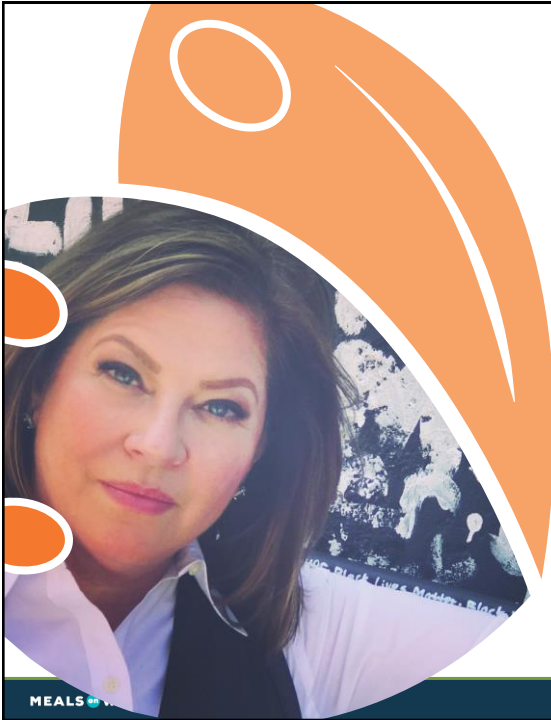
Email: crystal@mealsonwheelsamerica.org

Member Advocacy Center

www.mealsonwheelsamerica.org/advocacycenter

Member Central www.mealsonwheelsamerica.org





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Fundraising
TRANSFORMED
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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.

Subscribe for free resources
www.tammyzonker.com



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