Uncovering and Understanding Prospect and Donor Motivation

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Centerpoint Energy Power Tools for Nonprofits

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Relationship Building
Objectives of the Cultivation Process

- Achieving a genuine relationship
  - Moving from prospect to friend
  - Moving from friend to donor
- Realizing the largest possible gift
  - At this time from this prospect
- Cultivation requires the most activity of any stage
Cultivation Outcomes

If you inquire...

• About their values
• About their interests
• About their giving

They will tell you...

• What to ask for
• How to ask
• Or not to ask
The Seven Faces of Philanthropy
The Seven Faces of Philanthropy

- Communitarians (26%)
- Devout (21%)
- Investors (15%)
- Socialites (11%)
- Repayers (10%)
- Altruists (9%)
- Dynasts (8%)

The Communitarian (26%)

“Doing good makes good sense.”

- Local history, roots and giving
- Focus on results rather than plans for the future
- Expect recognition
- Personal and family well-being tied to the well-being of the community
- Philanthropy is an exchange - benefit is impact on the community
Messaging – The Communitarian

Philanthropic Personality
• Responsibility
• Service
• Fund raising
• Accountability
• Socially responsible
• Good for the community

Positive Images
• Supporting each other
• Serving the community
• Civic responsibility
• Leadership
• Doing good
• Effectiveness
The Devout (21%)

“Doing good is God’s will.”

- Proportionate giving
- 96% of giving directed to faith matters
- Supports religious causes, outreach and mission work
- High trust – giving is an act of faith in the religious community and its leadership
- Philanthropy is an obligation – tied to spiritual development
- Act of faith in the cause/ institution
Messaging – The Devout

Philanthropic Personality
• God
• Duty
• Service
• Sense of purpose
• Supporting each other

Positive Images
• Mission
• Doing good
• Opportunity
• Good works
The Investor (15%)

“Doing good is good business.”

• Gives carefully after investigation
• Looks for measurable ROI
• Tax avoidance is a high motivator
• Think of giving and investing in the same terms
• Philanthropy is a business relationship
Messaging – The Investor

Philanthropic Personality
• Results
• Performance
• Fiduciary
• Professional
• Accountability
• Doing good

Positive Images
• Efficiency
• Effectiveness
• Well-managed
• Leadership
• Opportunity
The Socialite (11%)

“Doing good is fun.”

- Motivated by creativity of event planning
- See themselves as fund raisers, not donors
- Philanthropy as social exchange – of building or increasing a social or business network
- Attracted to social circle, entertainment and doing good
Messaging – The Socialite

Philanthropic Personality

• Special event
• Charity functions
• Fund raising
• Supporting each other

Positive Images

• Serving the community
• Leadership
• Doing good
• Fellowship
The Repayer (10%)

“Doing good in return.”

• Response to life-changing experience – often education or health
• Benefit first; then charitable response – gratitude
• Highly focused giving
• There is a desire to extend the benefit
• Emphasis on results and beneficiaries
Messaging – The Repayer

Philanthropic Personality
• Pay back
• Grateful
• Effectiveness
• Socially responsible

Positive Images
• Supporting each other
• Made a difference in my life
• Doing good
• Opportunity
The Altruist (9%)

“Doing good feels right.”

- Genuine selfless donor – lone philanthropist
- Internally driven – self-actualizing, moral imperative
- Focuses giving on the marginalized, social causes
- Wealthy have greater obligations to give
- Tends not to be influenced by others
- Focus on personal integrity of staff, not results
Messaging – The Altruist

Philanthropic Personality

• Self-fulfillment
• Sense of purpose
• Self-actualization

Positive Images

• Socially responsible
• Doing good
The Dynast (8%)

“Doing good is a family tradition.”

- Philanthropy is a strong family value
- Generational differences – creativity
- Most careful and selective of all
- Focuses on core mission of institutions
- Philanthropy product of early childhood socialization
Messaging – The Dynast

Philanthropic Personality
- Family tradition
- Responsibility
- Socially responsible

Positive Images
- Supporting each other
- Family history
- Doing good
Applying the Seven Faces

**Identification**
- Prospects can have multiple faces
- “Faces” can change over time
- Look for lifestyle, language, patterns of giving and involvement

**Implications**
- Consider the solicitor – your face
- Personalize the cultivation process
- Customize the materials
- Base the “the ask” on the face/insight

benefits.paychex.com
Observations and Questions
In Summary

• Fundraising is about people
• Excitement precedes asking
• Asking involves a process
• Ask is face-to-face
• You set the positive tone
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