

# It Takes Two to Tango... Tapping into the Motivations of Giving

## Donor Stewardship

- Donor or investor?
- Motivations of giving
- 11 principles of donor stewardship
- Trends
- Making this real

# Definitions

- **Donor**

Someone who willingly gives resources for nothing in exchange  
- \$\$, time, in-kind, body parts

- **Investor**

Someone who directs resources to a specific cause or issue in order to derive benefit either personal or social.

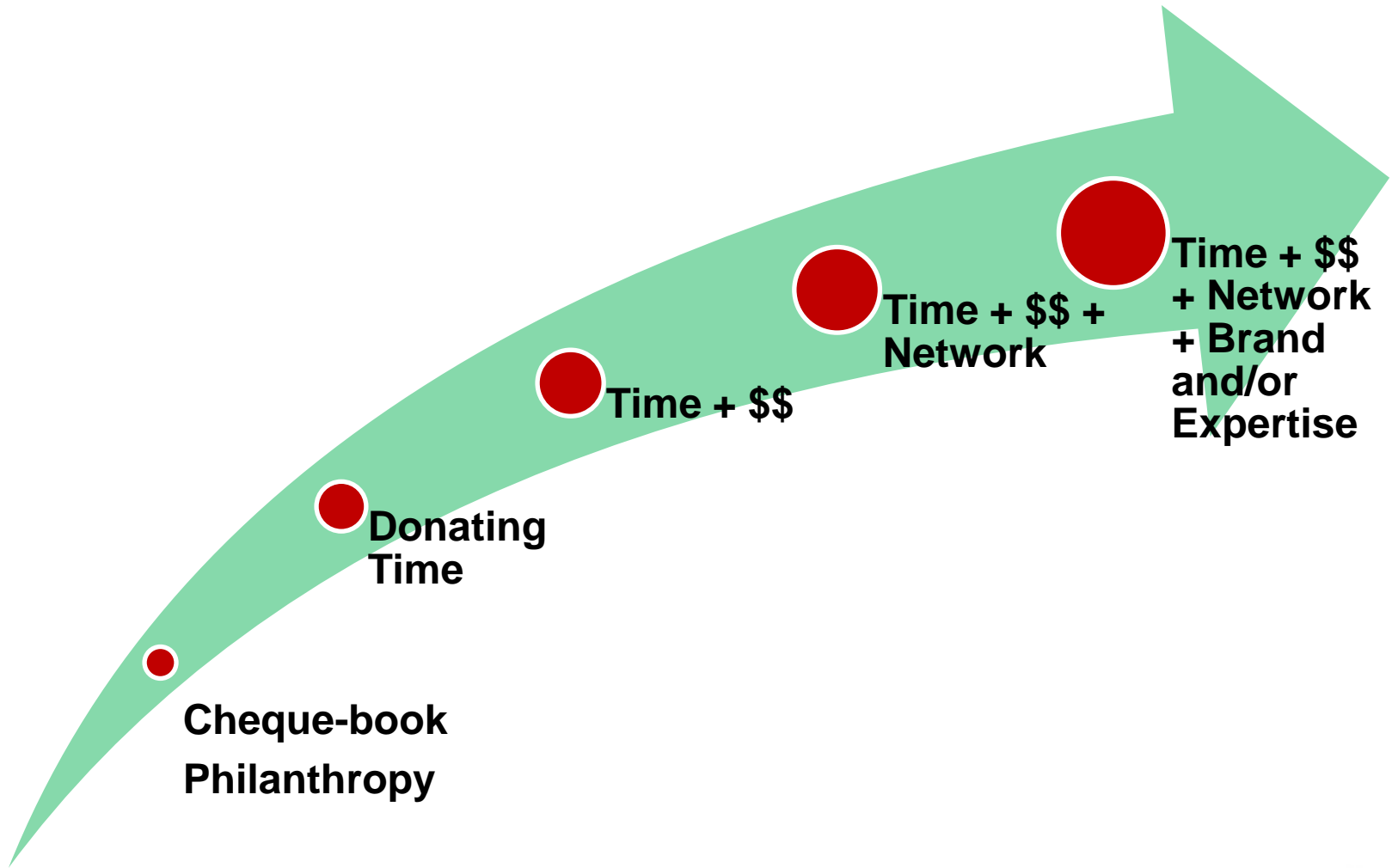
- **Community Investment**

The activity of directing resources to a cause or project with the expectation that the community/society will have measurable benefits.

- **Corporate Citizenship**

A company's community program that engages all stakeholders and includes social policy development

# Ladder of Engagement



3 Case Studies for Discussion (Moving a Donor up the Ladder of Engagement)

# TABLE ACTIVITIES

## Kristi

Bio: Mid-40's married, no kids but very engaged in her neices/nephews lives, successful business owner (family company), planning a major liquidity event, considering a major, multi-year gift to a local charity with a provincial mandate, has been involved with organization for years.

What else should we know?

## Marie

Single no children, mid-50's, well-travelled, strong family connections, highly educated, focused on international development and supporting local art community, has resources to establish an endowment within an organization or a foundation to support multiple agencies.

What else should we know?

AI

Late 70's, widower, successful businessman, set up a foundation as much about giving as about tax planning, has children and grandchildren and is engaged in his religious community.

What else should we know?

# Motivations

- To find out what influences people's philanthropy
  - Volunteerism
  - Giving
  - Receiving
  - Modeling

What questions would you ask to figure out these motivators?

In groups of 2 or 3 - Discussion

# **SMALL GROUP ACTIVITY**

- What is your most rewarding and/or significant volunteer experience?
- What is the most valuable thing that you gave?\*
- What is the most valuable thing that you received?\*
- How was philanthropy modeled to you?  
Who demonstrated this?

\* Tony Myers & Scott Decksheimer

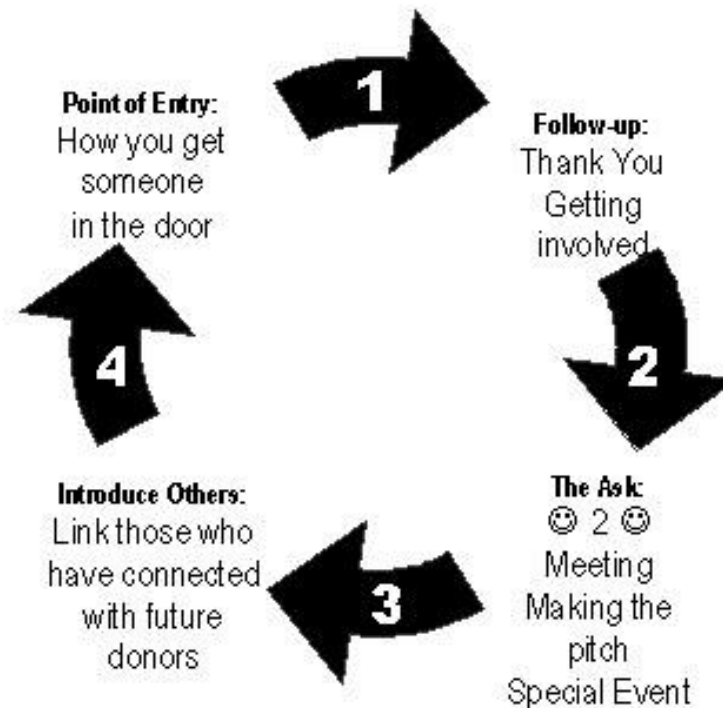
- As of Mar 2011 – over 50,000 NGO's and NPO's on Twitter
- February 2011 – JUMA launches → Facebook for Charities
- 55-65 yrs old → Fastest growing demographic on Facebook



- 40% of all donations under \$100 are made online (CanadaHelps 2009)
- 60-80% of Americans check out a charity online before making a donation (American Institute of Philanthropy and GiveWell.org)

# Integration

## *Raising More Money*



# From donor to investor

1. Start with the first gift
2. Alternate messages to your donors
3. Have a budget
4. Stewardship = budget + image of agency + amount
5. Involvement of top donors (where on the ladder do they fall?)
6. Tapping into donor network
7. Stewardship program reflects mission
8. Focus on intangible benefits
9. Maintain relationship with long-term & major donors
10. Keep all donors part of your database unless they tell you otherwise
11. Establish relationships between donors & program staff

1. Board buy-in
2. Have a Stewardship Sub-Committee of your Fund Development Committee
3. Donor analysis
4. Create giving levels
5. Donor Outreach through marketing and promotional materials: mailings, phone calls, personal solicitations, interim reports, corporate and foundation proposals
6. Reporting
7. Monitoring and adjust

# Resources

Relationship Fundraising, Ken Burnett

Beyond Success, Randy Ottinger

Values Based Estate Planning, Scott Fithian

Raising more Money, Terry Axelrod

*Dexterity Client Interviews & Conversations with  
Leading Practitioners*

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