



# Don't Judge a Book by It's Cover: Unlock the Value of Every Donor

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America's biggest donors gave \$16 billion in 2022.

*Source: The Chronicle of Philanthropy, February 2023*

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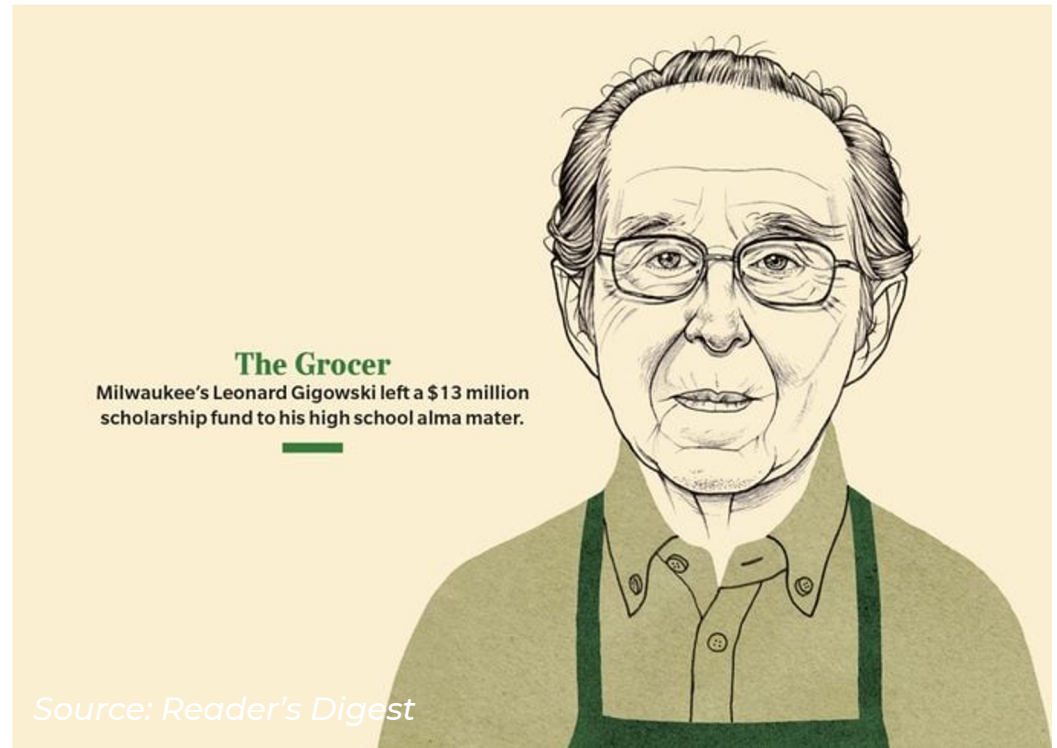
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**The Secretary**  
Sylvia Bloom left \$8.2 million to educational programs and a scholarship fund.

*Source: Reader's Digest*




**The Grocer**  
Milwaukee's Leonard Gigowski left a \$13 million scholarship fund to his high school alma mater.

*Source: Reader's Digest*





**The Teacher**  
Margaret Southern left \$8.4 million to the Humane Society and education causes.



*Source: Reader's Digest*

**The Janitor**  
Gas station attendant and janitor Ronald Read left nearly \$5 million to the local hospital, where he regularly had coffee.



*Source: Reader's Digest*



## How to Notice Them

- Stewardship activities
- Routine research
- Wealth screening



## Philanthropic Motivations (PM)

- Belief in mission
- Believe gift can make a difference
- Personal satisfaction, enjoyment, or fulfillment
- Give back to your community
- Tax benefit

*Source: The 2021 Bank of America Study of Philanthropy: Charitable Giving by Affluent Households*





## Philanthropic Motivations (PM)

- Remedy issues
- Support social justice aims
- Spontaneous response to a need
- When you are asked

*Source: The 2021 Bank of America Study of Philanthropy: Charitable Giving by Affluent Households*



## How affluent donors choose a cause or organization to support (PC)

- My values (71.5%)
- Interest in issue (57.2%)
- Recognizable, reputable non-profit (55.4%)
- First hand experience (52.1%)

*Source: The 2021 Bank of America Study of Philanthropy: Charitable Giving by Affluent Households*





## How affluent donors choose a cause or organization to support (PC)

- Perceived need (48.0%)
- Association with another institution (24.5%)
- Non-profit ranking reports (20.3%)

*Source: The 2021 Bank of America Study of Philanthropy: Charitable Giving by Affluent Households*



## How affluent donors choose a cause or organization to support (PC)

- Compelling pitch (13.1%)
- Social circle endorsement, pressure (10.9%)
- Affinity group discussions (2.5%)

*Source: The 2021 Bank of America Study of Philanthropy: Charitable Giving by Affluent Households*



**Don't Make a  
Mistake... A Big  
Mistake!**



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## He died a year ago. His estate just gave Tampa Bay charities \$63 million.

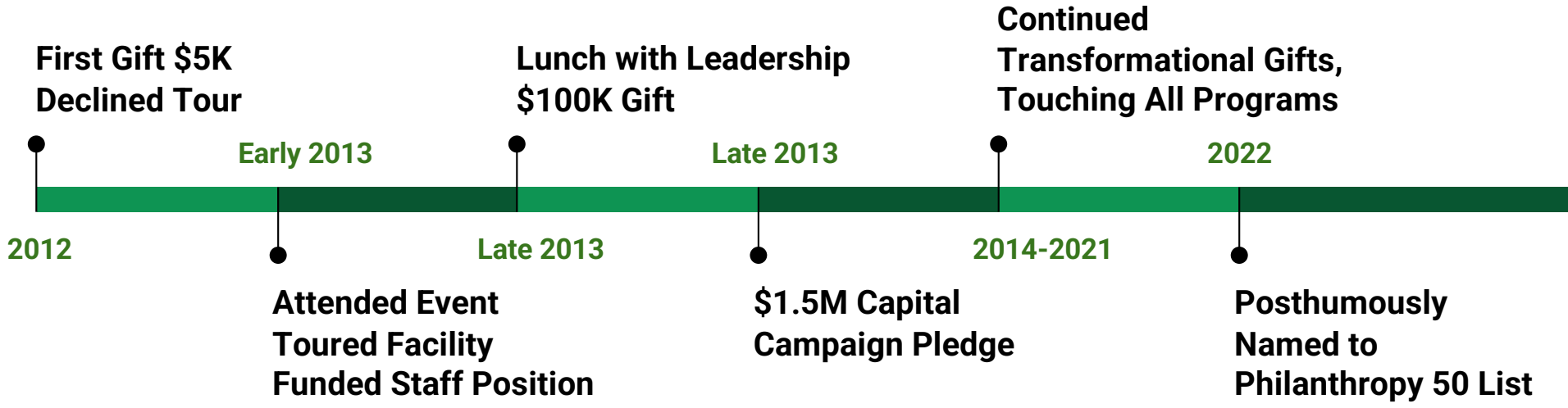
“A few nonprofits say the gifts from St. Petersburg’s “secret millionaire” David Baldwin are their largest ever.”

[Jay Cridlin](#), *Times staff*  
Published April 6, 2022





# Timeline of a transformational gift



September 2012

- Donor made first time gift of \$5,000
- Immediately called to thank, asked about motivations
  - Liked efficiency of organization
  - Declined invitation for tour



Belief in mission  
Tax benefit



Non-profit ranking reports  
Interested in the issue  
Recognizable/reputable non-profit



January 2013

- Donor attended Donor Appreciation Event
- Expressed interest in taking tour



Perceived need  
Compelling pitch

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February 2013

- Donor toured food pantry and health center



Belief in mission  
Tax benefit



Interest in the issue area  
First hand experience

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# Engage Donors

Your turn!

With 2 other people, think of 3 unique ways to engage a donor while asking meaningful questions.







February 2013

- Made commitment to support ARNP position



Personal satisfaction, enjoyment  
or fulfillment  
Spontaneous response to need



Interest in the issue  
Compelling pitch

August 2013

- Lunch at Women's Residence with executive director, Health Center Director, Director of Women's Residence



- Belief in the mission
- Believe gift can make a difference
- Personal satisfaction, enjoyment or fulfillment
- Give back to your community

December 2013

- Donor informed of another need in Health Center
- Provided \$100K to fund need



Belief in the mission  
Believe gift can make a difference  
Personal satisfaction, enjoyment or fulfillment  
Give back to your community  
Tax benefit  
Remedy issues  
Support social justice aims  
Spontaneous response to a need  
When you are asked



December 2013

- Received \$1.5M pledge to kick off Capital Campaign



- Belief in the mission
- Believe gift can make a difference
- Personal satisfaction, enjoyment or fulfillment
- Give back to your community
- Tax benefit
- Support social justice aims
- Spontaneous response to a need
- When you are asked



- Recognizable/reputable non-profit
- Compelling pitch

2014 - 2021

- Continued to make transformational gifts to make dreams come true in every program of the organization
- Shared we were 1 of 4 charities in his will, but would not disclose details or share a copy





## Planned Gift

- Focus on values
- Cast a vision for something bigger
- Present the opportunity



He provided over \$11M to our organization while alive and \$9.5M upon his death.







## But...

- 5 other charities in Tampa Bay received a total of \$63M upon his death and they were all surprised
- One mentioned that he was giving \$17,000/year
- What would have happened if they hadn't judged a book by it's cover?



# Meaningful Conversations

Using your engagement ideas, when you are with the donor:  
What information would be helpful to glean from the donor?



**What information would be helpful to glean from the donor?**

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# Engagement Defined

Ways donors interact with the nonprofit and strategies the organization uses to create stronger ties with its supporters. Donor engagement leads to donor retention.





# Ethics of Donor Relationships

- Relationship with the organization
- Research parameters



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