



# TO INFINITY

## AND BEYOND MOVES MANAGEMENT

**AFPICON**  
2023 | NEW ORLEANS  
APRIL 16-18

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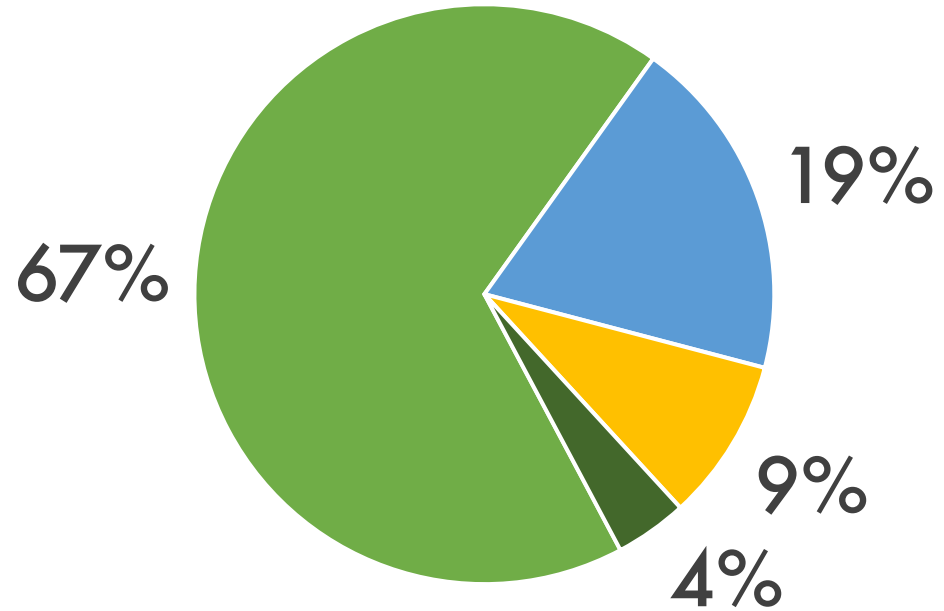


# Giving Trends

CONTEXT TO THE CONVERSATION

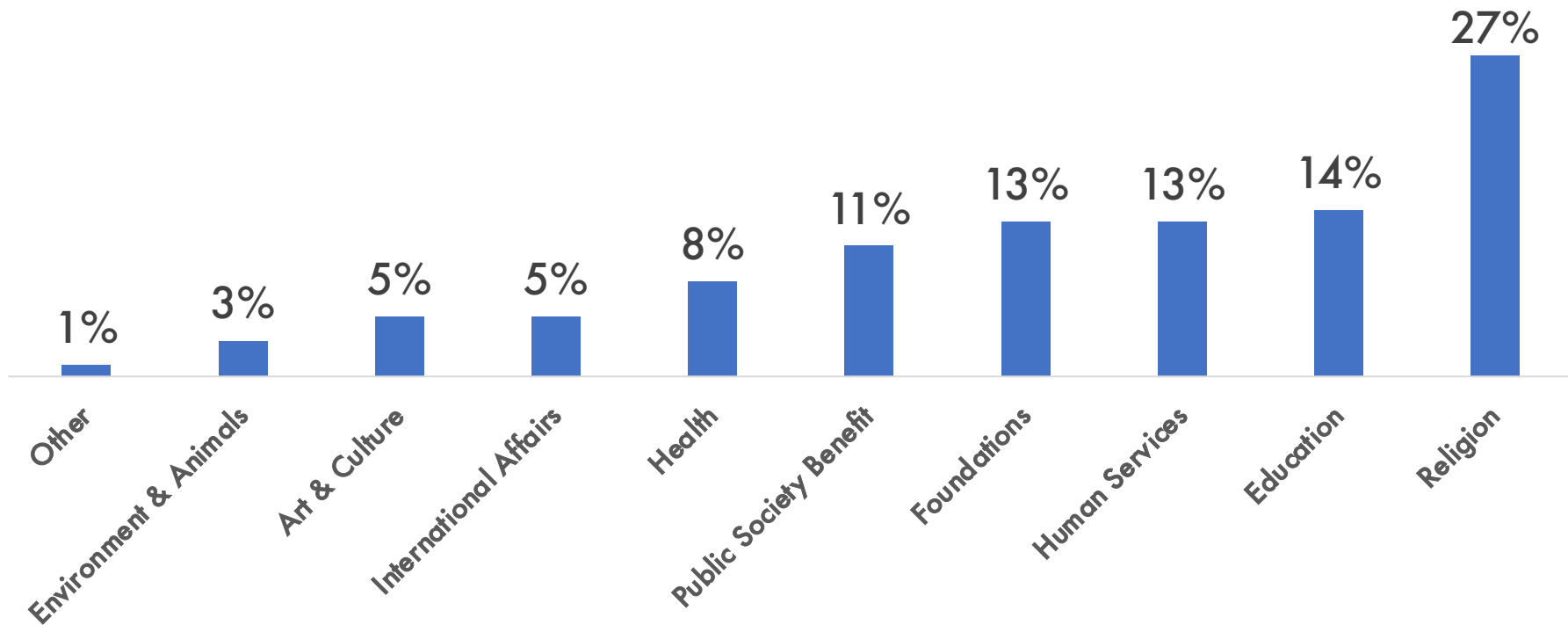
# Giving Sources 2021

- Individuals
- Foundations
- Bequest
- Corporations



Source: *Giving USA: The Annual Report on Philanthropy for the Year 2021 (2022)*. Chicago: Giving USA Foundation.

# Giving Destinations 2021





# Participation & Retention 2021



DONORS

-5.7%

(+/- 0.5%)

YOY change



DOLLARS

2.7%

(+/- 0.5%)

YOY change



RETENTION

-4.0%

(+/- 0.5%)

YOY change

Source: AFP Fundraising Effectiveness Project

# Participation & Retention 2020



## Donors

(Year-to-date) 107.3%

↑ +7.3%  
YTD Change



## Donations

(Year-to-date) 110.6%

↑ +10.6%  
YTD Change



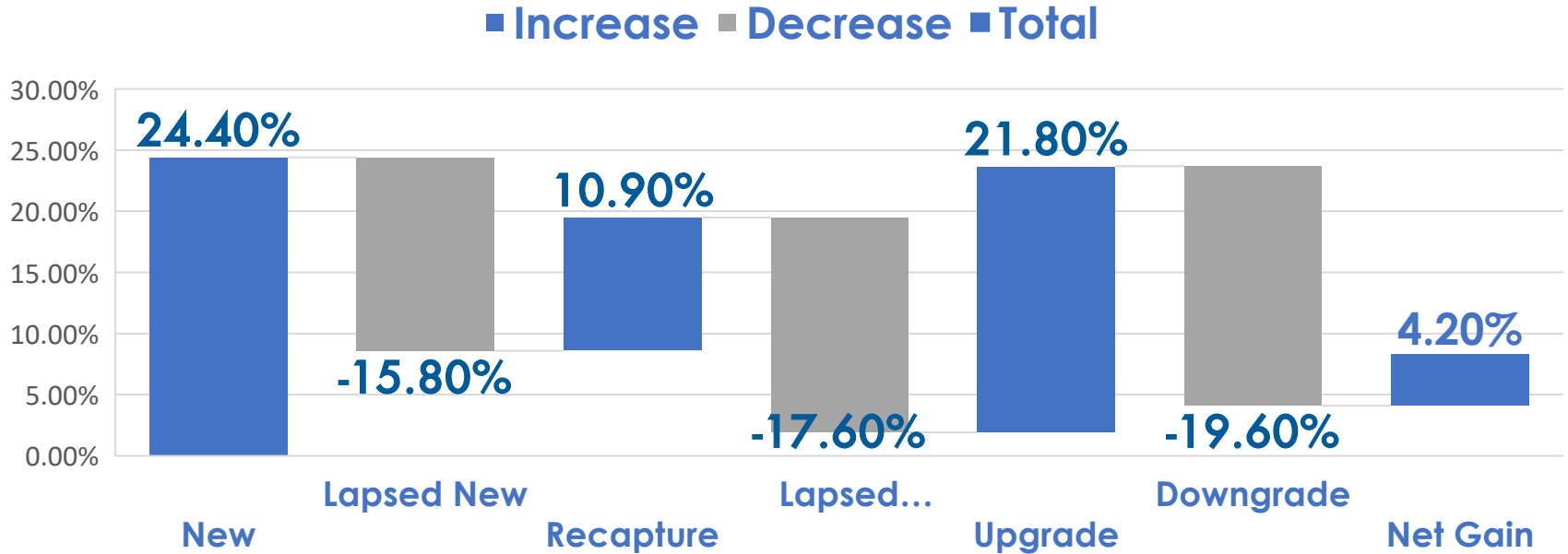
## Donor Retention<sup>1</sup>

(Year-to-date) 43.6%

↓ -4.1%  
YTD Change

Source: AFP Fundraising Effectiveness Project

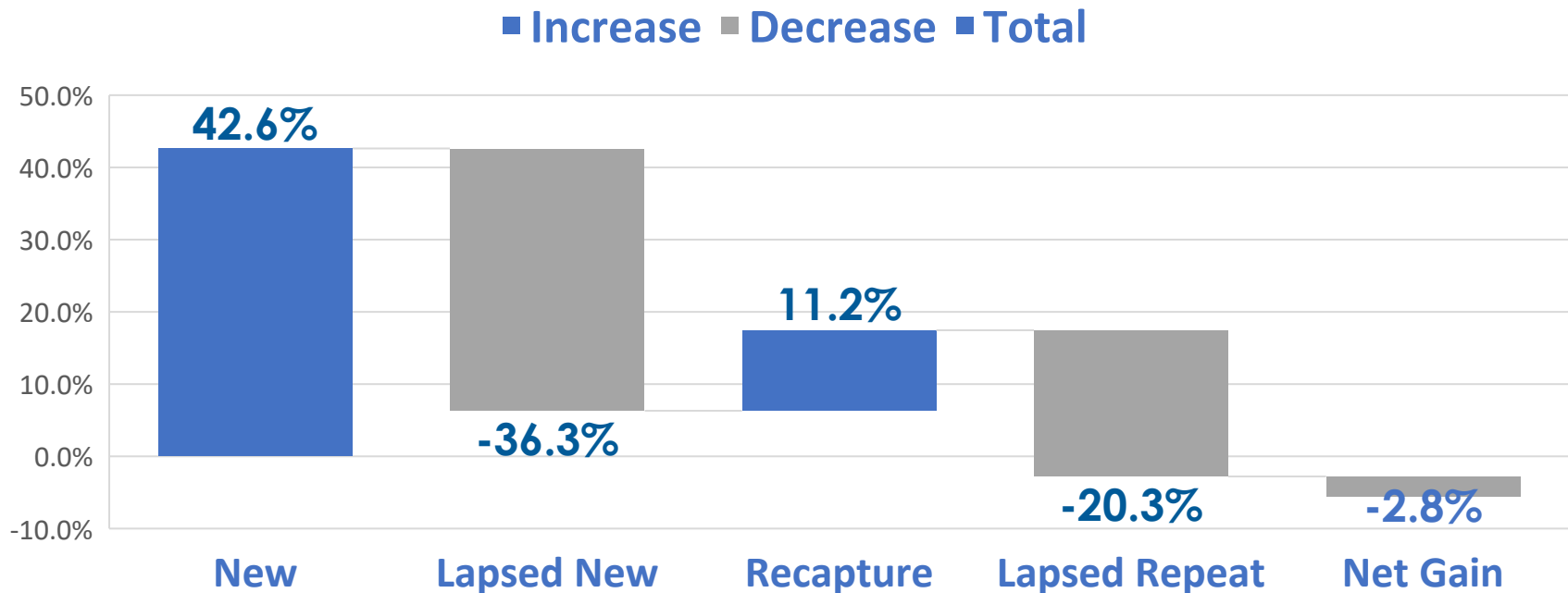
# Giving Growth 2019



Source: AFP Fundraising Effectiveness Project

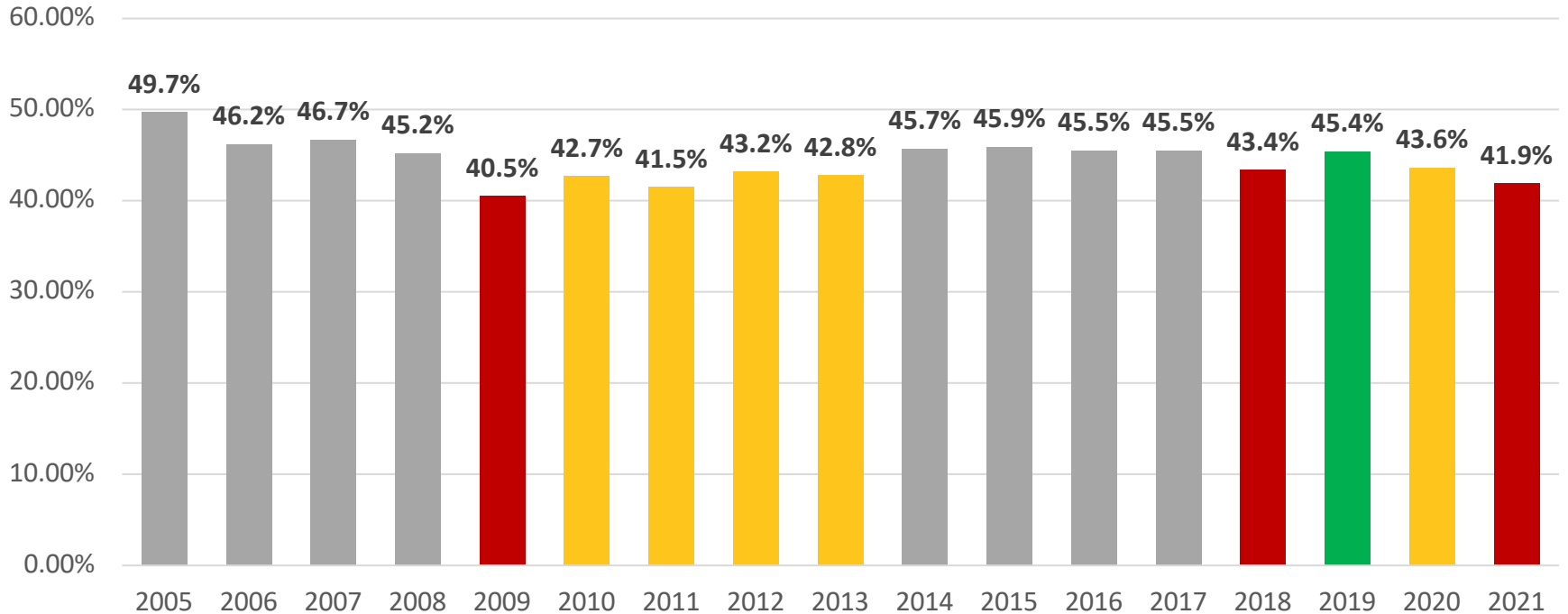


# Donor Participation 2019



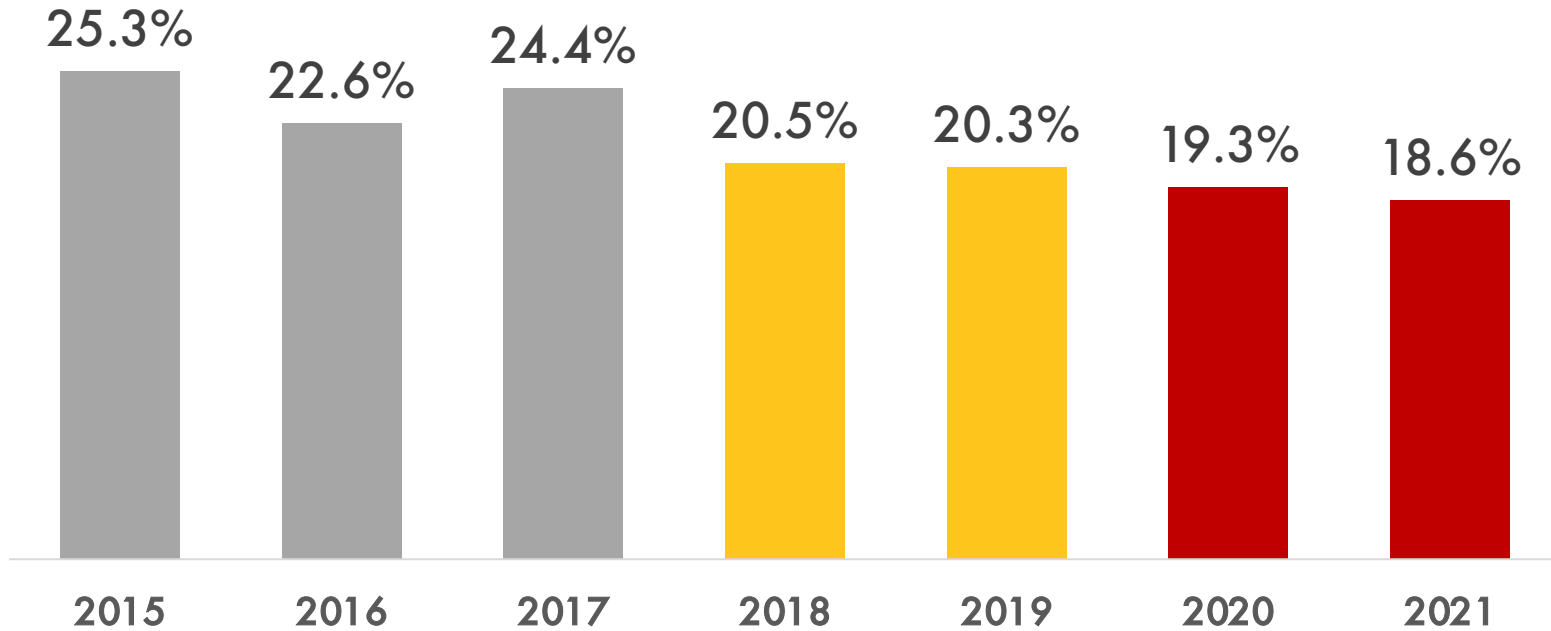
Source: AFP Fundraising Effectiveness Project

# Annual Donor Retention Rates



Source: Fundraising Effectiveness Project: (2022)

# New Donor Retention Rates



Source: Bloomerang. (2022). A guide to donor retention. Retrieved from: <https://bloomerang.co/blog/donor-retention>



# Giving Motivations

CORPORATE AND INDIVIDUAL

# Corporate Motivations

**Productivity** – Increases profits or improves ROI for business interests

**Altruistic** – Addresses need in community or where company does business

**Stakeholder** – Improves corporate identity for constituents, employees, community

**Political** – Protects power and/or builds influence

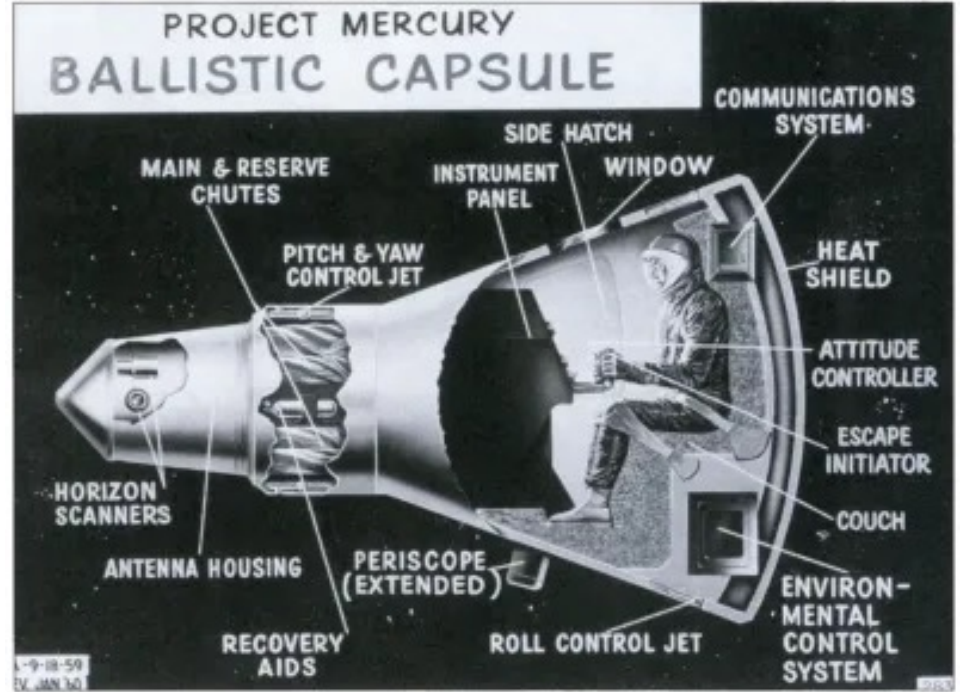
Source: Tempel, E. R., Seiler, T. L., & Aldrich, E. E., eds. *Achieving Excellence in Fundraising* 3<sup>rd</sup> ed.



# Individual Motivations

## Complex & Multidimensional

- Social
- Emotional
- Spiritual
- Generational
- Cultural
- Psychological





# Transactional vs. Transformational

FROM COMMODITY TO COMMUNITY MINDSET

# Transactional Mindset

## Organization Focus: Mission / Needs / Outcomes

Organization

SELL →

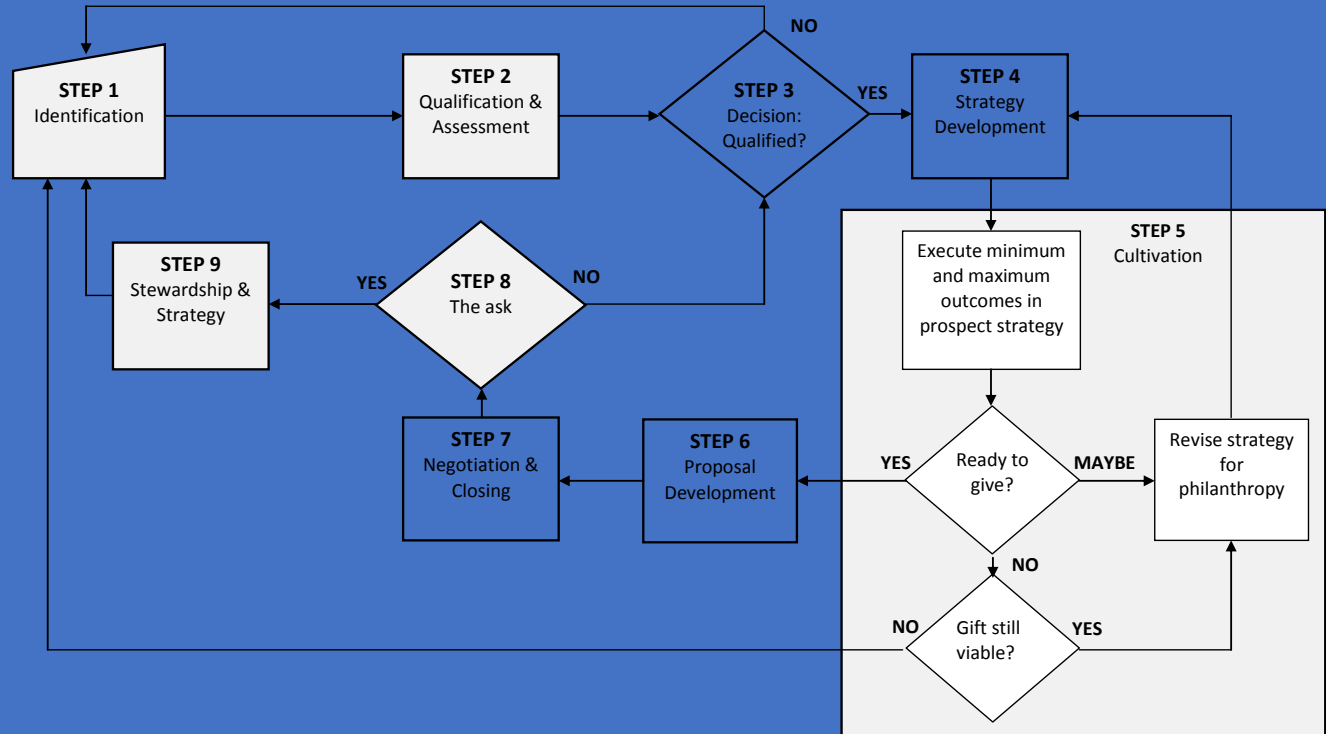
COMMODITY



Donor

← BUY

# Giving Cycle





# Transformational Mindset

## Donor Focus: Passion / Impact / Engagement

Organization

Invite →

COMMUNITY

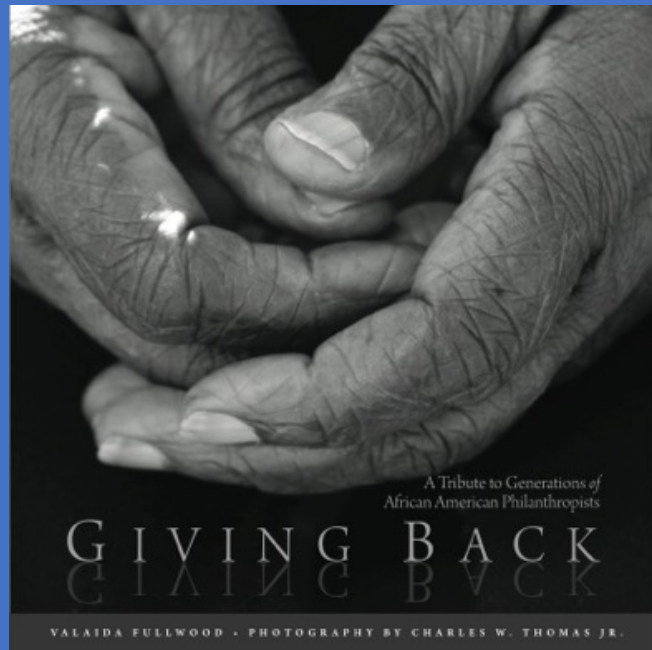


Donor

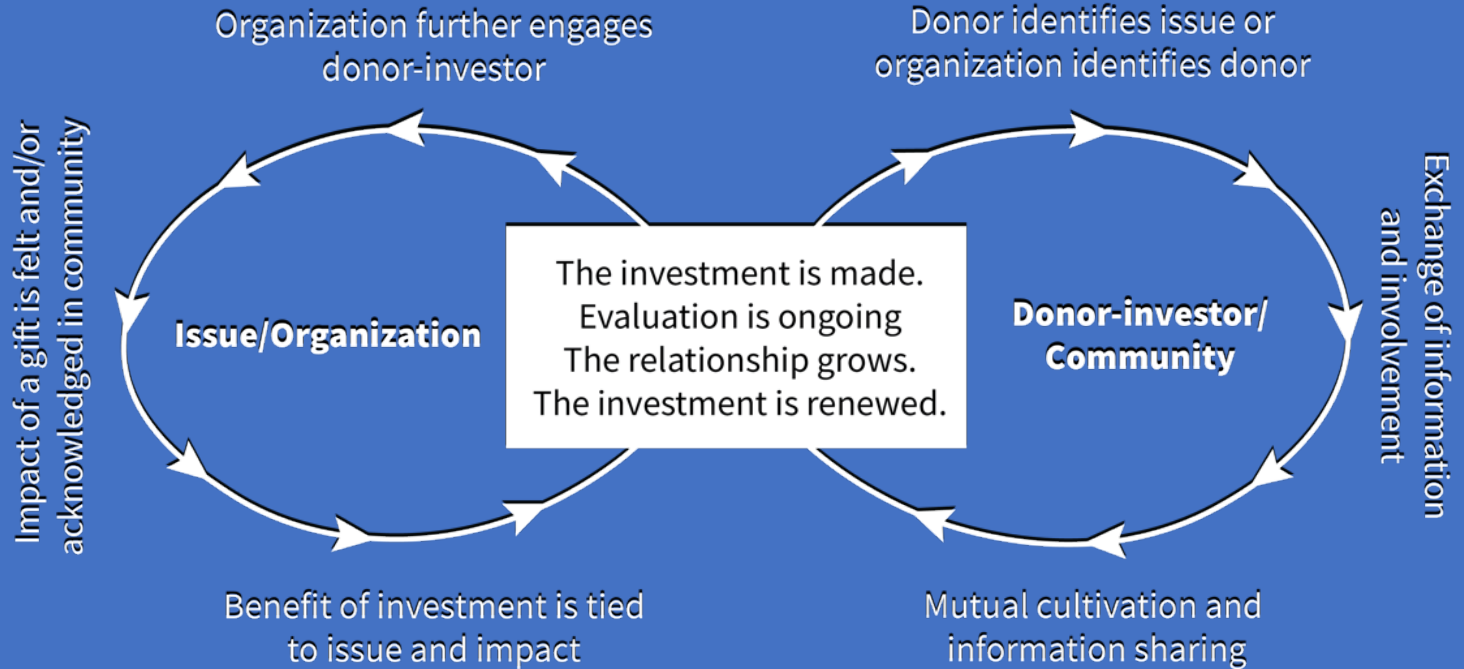
← Join



*“Philanthropy is deeper than your pockets.”*  
Valaida Fullwood



# Infinite Loop



Source: Grace, K. S., Wendroff, A. L., *High Impact Philanthropy*, (John Wiley and Sons, 2001).



# To Infinity

TRANSITION TO TRANSFORMATIONAL

# Leading Self

## Change...

- Your mindset
- Your approach
- Your “measures”
- Donor experience
- Donor expectations  
(over time)



# Leading Up

## Influence...

- Organizational values
- Leadership assessment of performance
- Language and culture
- The donor experience
- The role of philanthropy in the organization

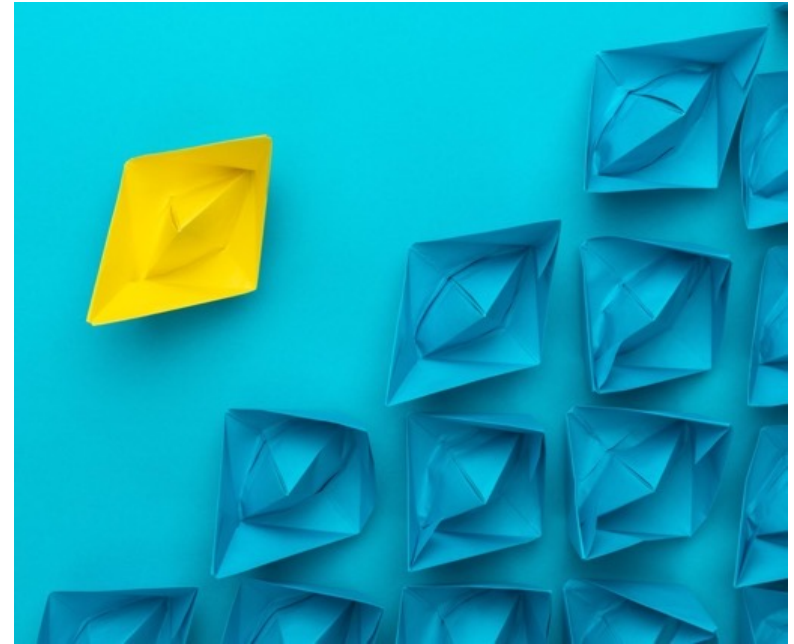




# Leading Your Organization

## Establish...

- Philanthropy is more than money
- Relationships are responsibility for all
- Importance of community impact
- Trust and credibility to gain same in return



# Leading the Sector

## Exemplify...

- Change begins at home
- Model the way for others to follow
- Tell the story
- Bring others along with you



# Continue the Conversation

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