

“Growing Donors Into Transformational Philanthropists”©

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Transformational Philanthropists are distinctly different from donors. My experience is that people move from being donors into becoming transformational philanthropists when they become passionate about making a difference and partnering with a specific cause or organization to accomplish this goal.

Due to the sense of ownership and excitement on the part of the person making the transformational gift, he or she is as positively impacted by the gift as the recipient organization.

It is critical to understand that the actual size of the gift is not the key factor; rather it is the sense of impact that is the distinction between donor and transformational philanthropist!

So how does one help create passion, partnering and positive impact? It is our experience that the pathway from donor to philanthropist is through the giving of a transformational gift.

These gifts occur as the result of matching a person’s core values, passion and purpose with the perfect opportunity for him or her to give to your organization.

Before this can happen, the givers must identify and be able to articulate their core values which are directly linked to their passion. Then, assuming this is a material or financial gift, they must integrate the Purpose of the Lives with the Purpose of Their Wealth to activate the gift.

In order to reach the destination of Transformational Giving, here is the **Pathway of Awareness** we have discovered individuals, couples and families need to walk. This journey does not just randomly happen; rather it is contained within a system of self-discovery called Purposeful Planning. (While I am sure there are other processes available to accomplish this, I am going to use Purposeful Planning as my example because it is the system with which I am most familiar.)

Through a series of carefully chosen exercises and questions, this interactive process is designed for individuals, couples and families to discover who they are, what is most important about life to them and how it is they want to make a positive difference in this world.

It is intentionally designed to lead to a deeper connection within them and then naturally extends the opportunity to connect with others most important in their lives. (These can be individuals or groups of people and may include both our family of origin through the family of humankind.) It is specifically designed to lead participants to Transformational Philanthropy.

The Pathway of Awareness begins at a place called **Connection**.

Connection is a basic need of **all** people – men and women, younger and older. In the book, From Effectiveness to Greatness, Stephen Covey cites a study conducted at the Dartmouth Medical School in which neuroscientists actually prove that the human brain is hard-wired for connection. In other words, rather than simply a matter of choice, it is a physiological function or need to each of us to connect with other people. The choice we are given is how open or vulnerable we are willing to be compared to how closed or withdrawn. In other words, how willing are we to connect?

For donors to become transformational philanthropists they must choose to connect...

First within themselves so that are “comfortable in their own skin”;

Then, with their core life values and beliefs;

With their life purpose and passion;

And also with others.

The Purposeful Planning System uses carefully designed assessments, questions and conversations which lead to Connection.

Once we are Connected with ourselves and others, we find both our authentic **Voice** and the courage to speak it. No longer are we compelled to “Say what Dad’s wants to hear” or “To keep pleasing Mom”. Rather, with respect for all, we define who we are and begin to make a clear space for ourselves in the family and in the world.

As we continue to gain the quiet confidence of living a more authentic life, we’re ready for the next steps on the Pathway of Awareness - Purpose **and** Passion. We feel where our energy naturally flows and are excited to act on what is clearly most important in our lives. Again using proven tools within the Purposeful Planning System, we begin to author the chapter of “My Life Purpose and Passion”. We sign it with love and gratitude as we step into the person we were meant to be and begin to live our life with a genuine constancy.

It is this newfound passion and energy that allows us to begin to experience the world differently. “Doors begin to open” and “opportunities suddenly appear” which are aligned with our newly discovered sense of significance resulting from living our authentic life.

As we begin to experience first one opportunity and then another, our creative mind begins to imagine what difference we might actually make with dedicated and continuous attention to this goal. Combined with the most advanced parts of the Purposeful Planning System, our **Vision** becomes clear. This represents our high calling or maximum potential – and is the next last stop on the Pathway of Awareness.

Now there is no stopping us... we are connected internally and grounded emotionally, psychologically and spiritually. With just a little more guidance we are ready to connect the purpose of our life with the purpose of our financial wealth.

These questions now become crucial to creating a Transformational Philanthropists:

To whom do I want to give? (Link to Connection)

Why do I want to do this? (Link to Connection/Purpose/Vision)

When shall I give? (Now/later?)

How much? (Now/ in total?)

What shall I give? (Cash/time/ appreciated assets/knowledge)

How shall I give it? (Outright/as a part of my overall legacy planning)

Here is some powerful information included in the Purposeful Planning System which helps donors answer these questions easily and confidently:

Understanding the 5 Dimensions of People and Money

No matter who we are, how old we are, our gender or nationality, all people have these same five dimensions in common.

First, we all obviously have the physical aspect to our lives. In addition to being the “shell” that we present to the world, this also encompasses how we treat our bodies and how we use them for good or ill.

Secondly, we have a financial aspect of our lives. This includes not only what we have in the way of material net worth, but it also has to do with how we use our money.

Thirdly, there is an emotional aspect to all of our lives. The emotional aspect is the need that we all have to be connected one to the other.

The psychological aspect of our lives has to do with our purpose. What is the purpose of our life? Why are we here? What are we to be doing with the gifts we have been to?

And finally, the spiritual aspect of our lives has to do with our need to have a connection with God, Source or a Higher Power.

The interesting thing about money is that it too has the same five dimensions or aspects to it that we find in all people.

Before we discuss this, it's important to remember that there are five basic actions we can take with money. We can earn it, save, spend or share it and invest it.

Now let's return to the Five Dimensions of Money. There is both a physical and a financial dimension to money. This is what it looks like, feels like and how far it does or does not stretch today.

The emotional aspect of money has to do with how the decisions we make regarding the earning, saving, spending, sharing or investing of our money causes either a connection or disconnection with ourselves and other people.

For example, can you remember a time when you made a decision to spend some money that caused a disconnect - either within yourself or between you and someone else?

By the same token, can you remember a time when you chose to either save, spend or share some money which caused a deeper connection within yourself or between you and someone else?

The psychological aspect of money has to do with its purpose. What is your money for-really? Why do you have it? Why do you have as much-or as little-money as you do? How are you to steward, and then pass on the amount of money which has been entrusted to you in this lifetime? And finally, how are you to align the purpose of your life with the purpose of your wealth?

The spiritual aspect of money has to do with its highest and best use. What is the highest and best use for your money? Please understand that sometimes spending money can represent its highest and best use. For example, if you helped her grandchild with a college education, could that not represent highest and best use?

If you simply needed to relax and paid for a massage, round of golf or a vacation, could that not represent a highest and best use?

As donors explore the answers to these questions for themselves, they often find themselves choosing to make different money decisions than previously. Once they understand and integrate the need for making “connecting money decisions” with the purpose of wealth representing its “highest and best use”, they have new and very solid guidelines for decision making. As they experience the satisfaction of aligning “who they are with what they have” within their decisions to share, they begin to feel the joy of transformational giving. Because Transformation Gifts connect the donor at much deeper level with the organization, it is essential for the development staff to follow up with the donor with much more than a “thank you”. It is imperative to ask this question: “What impact has making this gift had on you?” “What did making this gift mean to you?”

These questions reinforce for the giver that he or she has indeed moved to the level of Transformational Philanthropy as they articulate the meaning behind of gift. This process also builds lifelong bonds and connections which cannot be easily replaced “by the next organization’s appeal or solicitation letter”.

The Ultimate Goal: Multi-Generational Transformational Gifts

Once your organization and the first generation connect, it is then natural to offer Transformational Giving for the entire family.

This creates a vital opportunity for family members to increase their understanding of one another. Communication is enhanced as, let’s say Generation 1 (G-1) shares with Generation 2 (G-2) and Generation 3 (G-3) why and how making this gift mattered. G-1 talks about values and beliefs and shares from the heart what it means to them knowing that they have made an impactful difference perfectly aligned with their core values.

As they conclude their story, the offer is extended to G-2 and G-3 to “also find their voice and values” in a similar way. This also connects the families at an entirely new level and improves intergenerational communication as families excitedly rally around shared values and beliefs and making a difference.

The Purposeful Planning Process is truly a win-win-win! Individuals discover and commit to their core life values in a new way, family members connect with one another around shared values and beliefs and choose to make a difference together and the not-for-profit community creates lasting relationships.

In summary, the Purposeful Planning process is grounded in the practice of Servant Leadership and the belief that “It’s all about them”. In other words, “It’s all about serving the donor and donor family” as we lead them to discover what makes life worthwhile for them. Once that is clear, we match the purpose of the organization with the purpose and vision for the donor’s life and wealth and magic happens for everyone!

So when we ask ourselves, what are the universal things that people want from life, the answers include:

- To love and be loved (Connection);
- To make a difference (Purpose); and
- To be all I can be (Vision).

And when we ask what it is that most concerns people today, we often hear:

- An emphasis on things rather than relationships (Lack of Connection); and
- A loss of values (Lack of Purpose); and
- Busy, but empty lives (Lack of Vision).

The Purposeful Planning Process and Pathway of Awareness lead people to both discover and remember what is most important in their lives. As a result, Transformational Philanthropists are created.

Because Transformational Gifts represent the Highest and Most Satisfying Level of Giving they create a lasting connection between the organization and the giver.

What links Purposeful Planning and Transformational Giving is the deep need and desire of each person for Creating Meaningful Connections, Finding One's Authentic Voice, and Fulfilling His or Her Life Purpose and Vision.

In my experience, there is no higher calling for a development professional than to offer a process which leads to Transformational Philanthropy and there is no greater destination in life for any of us than to experience this amazing space of Transformational Giving. Truly, it's what life is all about.

Enjoy the journey!