

Gifts of Significance

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Nonprofit organizations large and small rely heavily upon major gifts to reach annual fund objectives as well as to ensure the success of capital campaigns. The Rosso model of a total development program depends on personal solicitation of major gifts to complete the donor pyramid. The definitions of a major gift vary as greatly as the institutions themselves. One thing is certain: major gifts are inspired gifts that have a significant impact on the development program and the institution. Such gifts make it possible to launch new program initiatives, transform the physical plant, and endow vital components of nonprofit organizations. Defining major gifts by their size alone is insufficient to characterize the role they play in an organization's vitality. One group's definition may be \$1000 while another's may be \$1 million. Frequently, major gifts are defined as gifts that constitute 1 to 5 percent (or more) of the gifts to an annual fund drive goal or 1/2 to 1 percent of the gifts to a capital campaign objective.

Gifts of significance come in many forms. They may be substantial cash contributions, gifts of appreciated securities, or in-kind gifts such as contributions of valuable art or tangible personal property. Often major gifts are in the form of multiyear pledges given outright or through planned giving vehicles such as bequests, charitable trusts, or gift annuities. Regardless of the form they take, gifts of significance usually come from donors who have contributed several smaller "gifts" over a period of time.

Hank Rosso's philosophy was that every donor at one level was a prospective donor for a gift at a higher level. Leaders in the field of development have posited models of gifting leading to the major or ultimate gift. Perhaps one of the best examples is that espoused by David Dunlop (2000). Dunlop classifies gifts as "annual," "special/capital," and "ultimate." His work details the size, frequency, types, and characteristics of gifts on a continuum. In this model, major gifts are ten to twenty-five times larger than the annual gift; they are infrequently requested and require considerable thought on the part of the benefactor prior to confirming a commitment. These and other similar models of major gifts presented by Dunlop give form and context to the work of major gifts officers.

Although most models focus on the size, type, and purpose of major gifts, a new or perhaps renewed paradigm of major gifts is emerging in the philanthropic literature as well as in the practice of development. These are models of ever-deepening relationships between the development officer and the nonprofit and benefactor's values and the institution's mission. Such models consider how the value systems of donors overlap with the core values and the mission of the organization.

These are the models of transforming philanthropy (see Exhibit 9.1). The theory behind such models is based upon the "why of giving" far more than the "how of giving." Gifts of significance are given to organizations that earn the trust and confidence of benefactors. Big ideas compel those philanthropically minded individuals to invest in, partner with, and commit to meaningful contributions to worthy organizations.

Relationship-based models of philanthropy require the development officer to be an “agent of change” as articulated by Sheldon Garber in a thoughtful essay (1993).

Exhibit 9.1. Stages of Transforming Philanthropy.

Transitional Stage: Giving	Transitional Stage: Naming	Transitional Stage: Changing
Ask and give Smaller gifts More frequent Acquaintances	Give and name Major gifts Less frequent Friends	Partner and change Gifts of significance Rare Soul mates

As an agent of change, the development officer is charged with participating in the articulation of the institutional mission, probing the core values of prospective major benefactors through values-based inquiry, and developing a deeper sense of the role and meaning of philanthropy in one’s life.

Linkage, ability, and interest apply in major gift fundraising. Regardless of the model of philanthropy, there are two essential aspects in the work of major gifts fund raisers. Development officers must work with volunteers to determine both the financial capacity of prospective benefactors and the inclination those benefactors may have to make a gift to a specific organization. Determining donor capacity requires the development officer to explore indices of wealth from public records, garner information from volunteers who know the prospective benefactor, and draw conclusions based on interactions with the benefactors themselves. Some development offices have full-time staff whose job it is to search databases and sources of wealth to determine the financial capacity of prospective benefactors. With or without such research staff, it is imperative that the development officer have all possible knowledge about prospective benefactors before formulating a request. Arthur Frantzreb (1991), in describing benefactor research, states the need to know the “interests, concerns, hobbies and eccentricities; education; family history, spouses and children; experience in the nonprofit world; residences; civic, social and fraternal positions; and religion” of potential major benefactors (p. 120). This information serves as a basis for evaluating donor capacity and inclination to make a major gift. Paul Schervish, in his studies of the wealthy, has postulated that the truly wealthy have the advantage of satisfying all their comfort needs in life and that such individuals no longer have to expend energies on accumulating wealth. Rather than focusing on asset accumulation needs, the truly wealthy can explore ways their resources can have a meaningful impact on the world (Schervish and O’Herlihy, 2001, pp. 3-4). These individuals have the capacity to

make a difference in the world and truly leave a legacy of caring through philanthropic gifts. In order to secure gifts of significance, one must cultivate relations with those of significant resources. But mere indices of wealth capacity alone do not suffice to inspire major gifts. Both an inclination to do good in the world and a specific interest in the organization are required for the realization of a major gift. Instead of merely chasing money, the development officer and volunteers must be cognizant of signs of wealth but must place more emphasis on individuals with a charitable nature.

Seeking natural partners is the prime responsibility of the major gift officer. Who are “natural partners” for one’s organization? First and foremost are present donors to the nonprofit. Major gifts generally come from those donors who already believe the institution’s mission and case for support. Other potential major donors are volunteers who are governing board or committee members; the nonprofit’s constituencies (alumni, former campers, members, and so on), and philanthropically minded individuals in the community. More and more studies are finding that individuals who are deeply religious and spiritual are more likely to use philanthropy to vote their values and to find meaning in their lives (INDEPENDENT SECTOR, 2002). Indeed, more than half of all individual gifts to nonprofit organizations have historically been directed to religious institutions. Searching for wealthy individuals who are spiritual and committed to making the world a better place is an important activity for major gift officers. Major gift programs must focus more time and attention on donors who believe in the organization and wish to propel it to new levels of service, efficiency, or effectiveness.

Using benefactor wealth research and referrals from board members, volunteers, and major donors, the development officer creates a list of individuals with the capacity to make a difference in the organization. It is then the officer’s responsibility to develop a plan to involve those donors in the life of the organization. For it is through involvement that philanthropic gifts of significance arise.

Numerous models describing stages in the solicitation of major gifts have been postulated over the years. The Fund Raising School (2002) uses an eight-step model (see Exhibit 9.2). As donors are further involved in the life of the nonprofit organization, they develop an “ownership position” in the good that is done through the organization. As donors increase their “equity share” in the institution and see their personal values overlap with the institution’s mission, more and more significant gifts are made to further the cause.

Exhibit 9.2. Major Gifts: The Eight-Step Solicitation Process.

- 1) Identification
 - 2) Qualification
 - 3) Development of Strategy
 - 4) Cultivation
 - 5) Solicitation and Negotiation
 - 6) Acknowledgment
 - 7) Stewardship
 - 8) Renewal
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Source: The Fund Raising School, 2002.

How does the development officer engage potential benefactors in the mission of the organization? Once natural partners are discovered, it is through genuine relationship building that the development officers promote major investments. Asking donors to volunteer on important committees, raise funds, share their expertise, and serve on the governing board are some of the most common ways of building ownership. The key is not so much a technique but rather the spirit behind the technique that is important. Potential major benefactors are in constant demand and volunteer burnout is rampant, but a surefire way to propel an organization into the arena of major gifts is to authentically involve donors in the mission of the nonprofit. Perhaps the highest form of reverence we can demonstrate to donors is to genuinely ask their opinions. Institutions need to involve donors and volunteers in important projects where their input is valued and their advice is sought. It is not through disingenuousness that major gifts arise. The wealthy, like all of us, are tired of being manipulated politically for our votes, economically to purchase products, and philanthropically to make gifts. The proper stance to take in relationship-based philanthropy is not to manipulate but rather to inspire, not to push someone to make a “transaction-based” gift but rather to make the mission and its work so real and important as to compel or “pull” a donor to make a gift. As Tom Morris said in his book *If Aristotle Ran General Motors* (1997), pull is the “lure of an attractive goal or a strongly desired good, recognized by Plato and Aristotle as well as by many other great thinkers of the past...embodying a valued ideal. It attracts us and calls us to put forward our greatest efforts. The greater the ideal, the greater the power it can have in our lives” (p. 63).

WHAT WORKS IN MAJOR GIFT FUND RAISING

Fortunately, in the past several years, practitioners in the field of philanthropy and professors in our nation’s universities have begun to explore more deeply why benefactors make major gifts and why donors say they do not make gifts. This donor-centered research is both refreshing and instructive. *The Seven Faces of Philanthropy* (Prince and File, 1994) categorizes wealthy donors into seven motivational types. This

important work looks at understanding the interests, concerns, needs, and motivations of wealthy individuals toward the role of philanthropy in their lives. By developing an understanding of such motivations, the development professional can better plan how to authentically involve a particular prospective benefactor in the work of the nonprofit. Cluster analysis by Prince and File revealed four important donor segments: “affiliators,” who look for social and business linkages through nonprofit activities; “pragmatists,” who see personal financial advantages through support of nonprofits; “dynasts,” who are heirs to family affluence and to the tradition of philanthropy; and “repayers,” who want to reciprocate benefits they or someone close to them received from a nonprofit.

Simply put, donors make major gifts because of a sense of obligation to the nonprofit, the greater community, or world. Gifts of significance arise out of the true interests, values, and passions of the prospective benefactor. Regardless of the particular motivation for giving, the role of the major gift officer is to engage the donor in the important work of the nonprofit and deepen the benefactor’s involvement in the organization’s mission and value systems.

It is also instructive to note why fund raisers fail or why donors refuse to make major gifts to nonprofits. Sturtevant (1997) identifies four of the most common reasons that major gifts fail to materialize: institutional leaders and development officers neglect to establish basic trust between the organization and the prospective benefactor; fund raisers fail to show the inherent value of the nonprofit’s mission, vision and services; nonprofit leaders don’t help donors to connect with the institution and serve the benefactor’s interests and needs; and fund raisers fail to instill a sense of urgency for the request. Donors do not make major gifts because of a mismatch of interests between donor and institution; a premature request before the donor was ready to give; a failure to ask for a specific amount; being asked too many times by the organization or by competing nonprofits; and a lack of connection between the solicitor of the gift and the donor.

INQUIRING AND INSPIRING

Given the anecdotal findings of professionals in the development field and the recent research of social scientists, we are better prepared to understand the motivation of major donors. The next question confronting nonprofits is how we best position our institutions and our prospective benefactors for success in the area of major gifts. Hank put it best when he said, “Fund raising is the gentle art of teaching people the joy of giving.” He long understood and practiced the idea of “transforming philanthropy.” He knew that major gift work was the result of relationship building. And like Sheldon Garber, he understood the need for development officers to be agents of change in the lives of their organizations and benefactors. What skills, then, do development professionals working in the area of major gifts need to succeed? Simply put, they require inquiry skills that will help them understand the values and motivations of potential major benefactors and train and manage volunteers, the ability to articulate the institution’s mission, and the creativity and passion to inspire the benefactor to action.

Being a successful major gift officer and volunteer fund raiser does not require having all the answers about the prospective benefactor, but it does require that development professionals and volunteers know all the right questions to ask of both the institution and the donor. As agents of change, development professionals and volunteers must be involved at the highest levels of decision making in the nonprofit. They must not only be skilled at articulating the mission but also be involved in creating the mission and moving the organization to greater levels of efficiency and effectiveness.

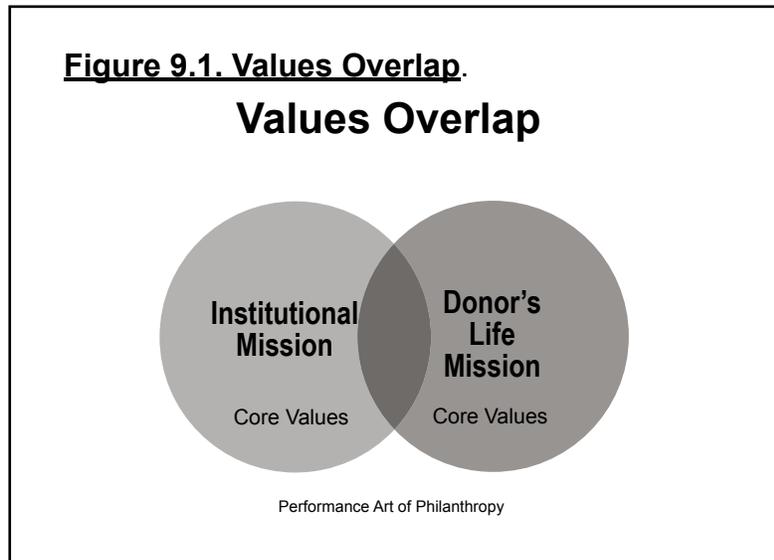
The following are some key questions the major gift officer must ask of the institution:

- o Is our mission relevant, important, and easily articulated?
- o Can we use outcome measures to determine if we are advancing the mission?
- o How can we better involve volunteers and donors in the good that is done through our organization?
- o Who best articulates our mission and vision for the future?
- o Who would be a natural partner with a particular benefactor?
- o Who is responsible for developing the relationship with a specific benefactor?

Every nonprofit must identify the “vision master,” that leader who brings the mission to life for benefactors. Just as important, each institution must identify the staff members with the skills to transform vision to action, to make things happen so as to advance the mission through definable steps and acts. Finally, the major gift officer must be a primary person to advance the relationship between the prospective donor and the institution. This is where donor and institutional values overlap and the “dance of philanthropy” is performed (see Figure 9.1). Some institutions discover that the vision master and best relationship developer may be the organization’s president or chair of the board of directors. For other nonprofits, there will be many hands in the work of eliciting major gifts. It is wise to have multiple links between the nonprofit and the benefactor. This prevents a reliance on few people to raise major gifts that can be devastating when and if the major players leave the nonprofit.

There are questions the major gift officers must ask themselves as well. To paraphrase Payton (1988, p. 74), who posed the most piercing question of all: Do we as professionals *work* for philanthropy or *off of* philanthropy? Why are we doing this important work? For major gift work is less of a job than it is a calling. Development professionals are not selling products; they are rather promoting visions and possibilities for the betterment of humankind. This is serious work taken seriously by the professionals engaged in it. O’Neill (1993) saw development professionals as moral trainers. Major gift officers are moral trainers whose work is about ethical inspiration (Rosso’s “teaching the joy of giving”). Hence one must ask, are we serving as role models for philanthropy? Are we making important philanthropic gifts ourselves? Do we serve as “soul models” of well-examined lives? And perhaps most important of all, are we devoted to helping donors find meaning in their lives through acts of philanthropy? For many prospective major benefactors know how to accumulate “means” but not “meaning” in their lives. One way of looking at major gift work is that development officers, volunteers, and donors are on a long walk together to find meaning in life. Meaning can be found through philanthropy.

Figure 9.1. Values Overlap.



As important as it is to be an agent of change through professional introspection and probing the mission and values of the institution, the great work of development is done through exploring a benefactor's values in an atmosphere of trust. Using a process Dunlop (2000) refers to as "nurturing inquiry," major gift officers ask defining value questions of donors. The classic work by Kübler-Ross (1969) on death and dying teaches that on their deathbeds, individuals do not measure the value of their lives by their net worth or accumulations; rather they measure their life's meaning based on whether or not they made a difference in the world and whether they're leaving a lasting legacy. It seems apparent that through philanthropy, development officers and volunteers can help donors provide meaningful answers to those deathbed questions. For this is the essential partnership in philanthropy: our institution's mission and the donor's value system equals more than either can accomplish separately. This makes the essence of major gift work "helping people to arrive before they depart!" This requires changing major gift work from role models in business to soul models in philanthropy. How are these transformations accomplished? By inquiring about the donor's core values and passions through values-based questions. By asking important questions, we help donors transform from motivations that are intrinsic to extrinsic, from self-centered to other-centered, and from independent to interdependent. Transforming major gift work is about changing "me-centeredness" to "we-centeredness."

QUESTIONS OF VALUES

Before elucidating some of the key value questions, it is important to set the rules of values-based inquiry. Before one asks important questions regarding values, it is necessary to establish an atmosphere of trust. Two essential components for an atmosphere of trust are permissions and protections. These are assurances to the donor that before we probe core values, we will seek their permission to enter a deeper relationship. Beyel (1997, p. 52) calls it “philanthropic informed consent.” This is a discovery process whereby the development officer and the donor engage in a moral and ethical dialog. This may be as simple as asking permission to inquire about closely held values, but more often it is an intuitive process, much like knowing when it is safe to ask an acquaintance a question we would normally ask a close friend. The second important way of establishing trust is to ensure that any information divulged will remain private and confidential. This means that the development officer must guard all insights gained and not mention them to the donor’s family, friends, or colleagues or in visit reports. Some key donor questions include these: What values do you hold most dear? Who has inspired you in your life and your work? How does one make a difference in the world? What is your legacy in the world today or in the world of tomorrow? Can you finish your legacy alone? How much is enough money to leave to heirs? Is there ever too much money to leave to heirs? What is the most satisfying philanthropic gift you have made and why? Which one of the nonprofits you support does the best job of keeping you involved in its mission? What kinds of reports do you want and expect as stewardship for your major gift? How do you prefer to be invited to make a charitable gift? These are only a few samples of key questions the major gift officer must ask while developing a relationship with each benefactor. These questions are asked at appropriate stages in the relationship. They are meant to be stretching questions but can become impertinent if they come too early in a relationship.

In addition to the individual contacts between officer and donor, strategic questions may be considered when the donor interacts with other members of the nonprofit board or staff. One highly successful way to ask many of these questions is through a donor profile interview. In this setting a donor is asked to participate in a profile of his or her life and philanthropy. These questions help turn dreamers into dream makers for your institution. For it is a truism that once they have fulfilled their own personal goals and dreams, highly successful individuals will often transform into major benefactors who will fulfill the dreams of others through the nonprofit.

BUILDING AN OWNERSHIP POSITION

The most important role of the major gift officer is to forge a close relationship between a donor and the nonprofit, including its volunteers. In the life and mission of the organization, one important device in this relationship building is philanthropic storytelling to elucidate to the benefactor great things that others have done to advance the organization’s mission through philanthropy. Storytelling allows the development officer to comfortably make maps for donors to follow with their own personal gifts. A

part of the cultivation and relationship-building process may be to ask the donor to make investment or “step” gifts to the organization. Charitable step gifts are smaller gifts given to the nonprofit that allow the organization to demonstrate how it uses contributions and how it reports on the impact of such gifts. It is important to ask for these smaller gifts, as they allow the donor to open a window into the nonprofit and provide the nonprofit with the opportunity to further involve the donor through meaningful stewardship and appropriate recognition. Solicitations of step gifts allow the development officer to determine if the proposal harmonizes with the donor’s core values. But rather than asking merely for any “starting gift,” it is paramount to consider what sort of gift will further involve the donor in the nonprofit and might naturally lead to additional gifts. The major gift officer should ask, “Does this proposal have the potential to grow into more substantial gifts by the donor?” A step gift request for a partial academic scholarship can lead to further requests to endow that scholarship and at some time in the future perhaps name the academic unit wherein the scholarship lies. Although step gifts are common ways to encourage major gifts, it is not unheard of for a first gift to a nonprofit to be a major gift. Development officers and volunteers must be alert to those unique individuals who can quickly catch a vision and make major initial gifts to the nonprofit.

Another way to involve donors in step gifts is to “borrow their collections.” Often potential major benefactors have accumulations that can be appropriately used by the nonprofit. These may range from art collections to private planes. By borrowing these accumulations, the nonprofit recognizes their value and demonstrates to the donor that their collections, as well as their donations, will be respected and used wisely.

THE REQUEST OR INVITATION

Most of the work of a proposal is done prior to writing the request and making the appointment with a benefactor. Donor values have been explored, an appropriate gift amount has been considered, and the proposal team has been carefully selected and has rehearsed the solicitation in detail. The major gift officer must ask several questions: Have we come to know this donor sufficiently? Has this donor been involved meaningfully in the work of our organization? Is this an appropriate time for this request? Have we got the amount and the purpose right?

In setting up the specific meeting to discuss a proposal, it is important that the potential benefactor know that the purpose of the visit is to be asked for financial support for an important project. This avoids fund raising by stealth or surprise and is the respectful thing to do. Where will the major gift proposal be made? The site should be chosen with the donor’s needs and comfort in mind. Usually it is in the donor’s home or place of business. Sometimes it takes place at the nonprofit, particularly if the request requires a tour or on-site demonstration of how the donor’s gift will be employed by the nonprofit. Public settings such as restaurants for major gift solicitations can be disastrous. A waiter may interrupt or stumble just as the proposal reaches its apex, spoiling both mood and decorum. Regardless of the setting, the major gift officer must be sure to ask, “Are all the decision makers at the table?” This means that appropriate leaders of

the organization, the donor and spouse and family, and legal and financial advisers, as appropriate, must all be on board. The proposal itself must be clear and include the gift amount, project goals and means of measurement, recognition options for the gift, and a plan for reporting or stewardship after the gift is made. A preproposal rehearsal will make certain that at the right time, the right person makes the specific request: “We are requesting your consideration of a leadership gift of (*specific amount*), which will be the catalyst for making this project a reality.”

STEWARDSHIP AND RECOGNITION OF MAJOR GIFTS

Once a gift commitment is entered into, the process of stewardship begins. To ensure there is no “donor regret,” to steal a term from the for-profit world, the organization must provide stewardship of the gift and send regular and meaningful reports. Reports on construction progress, thank-you letters from scholarship recipients, financial reports, lab tours, photos, and personal visits with progress reports are simply the best way to strengthen donor ties to the nonprofit. Stewardship is both ethical and essential following receipt of major gifts, and it is the smart thing to do to encourage future gifts from the benefactor.

Donor recognition is another way to involve benefactors in the nonprofit. “How would you and your family like us to acknowledge your generous gift?” is an appropriate inquiry. Recognition should be as personal as possible, reflective of the uniqueness of the nonprofit and the gift and appropriate to the size and importance of the contribution. Other major donors in waiting will examine how your institution respectfully recognizes, and exhibits stewardship for gifts of significance.

MANAGING THE MAJOR GIFT PROCESS

Whether a major gifts officer heads a one-person shop or is a part of a large and complex major gift team, the key to major gift success is in an organized system for the identification, involvement, and solicitation of potential major benefactors. The literature is rife with examples of how to manage the major gift process. Successful programs can be managed using simple index cards or sophisticated software programs. (Exhibit 9.3 provides a guide for managing the major gift process.) Regardless of the format, every institution must identify the top twenty-five to one hundred potential major donors whose philanthropy can have a significant impact on the organization.

Once identified, each donor should be assigned an individual file. Files should be developed with respect for the donor and include only information that is pertinent to the potential major gift. This information will be useful in determining what types of nonprofit projects will resonate with donor’s value systems. Private and potentially embarrassing information about donors has no place in these files. A good guide is only to place information, notes, or comments on donor contacts that could be read by the donor without embarrassment. Files should include the names of natural partners who are centers of influence in the donor’s lives. Vital is information about regular meetings

with institutional leaders to discuss the donor, his or her deepening involvement in the nonprofit, a realistic potential gift amount, and details of any projects of great potential interest.

Specific ways to further the donor's involvement and interests then can be documented. Essential to this management process is the appointment of the relationship manager, the person responsible for advancing the relationship using volunteers and other aides as appropriate. Many management plans suggest that a specific number of personal visits and other donor contacts are required between the major gift officer and the potential major benefactor during a given period of time. I believe, however, that it is not the frequency of the encounters that is important but rather how deep an impact the development officer or other institution leaders and volunteers have on a donor's sense of belonging to the nonprofit. Visit numbers are less important than meaningful encounters with predetermined objectives that increase donors' "equity share" in the nonprofit.

Exhibit 9.3. Developing a Strategy for the Major Gift Process.

Benefactor Biographic Information

- o Name, address, phone numbers
- o Family information, marital status, children
- o Degrees, interests and hobbies
- o Governing board and committee memberships
- o Interest areas for potential major gifts
- o Other pertinent publicly known information

Financial Information

What is known about the prospective benefactor's financial information and ability to make a major gift?

- o Public information on stock and real estate ownership
- o Previous gifts to the organization and other charities
- o Other pertinent public financial information

Linkages

- o Who are the individuals, staff, and volunteers closest to the prospective benefactor?
- o Who are the donor's natural partners?

Strategy

- o Who should be involved in the relationship building, proposal development, and the request?
- o For what specific purpose is the gift being sought?
- o What is the proposed gift amount?
- o Who will present the proposal?
- o When will it be presented?
- o What specific steps or next actions must be accomplished before a proposal can be made? By whom? By when?
- o Are there any roadblocks to this proposal, and if so, who can remove them?
- o What coaching, rehearsals, or strategy planning sessions will be necessary?

Specific Next Steps

- o Set up a reminder system, manual or computerized, to monitor next steps and for revision of strategies as appropriate.
 - o Determine what actions should be taken, by whom, and by when?
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CONCLUSION

Some specific techniques of major gift work have been explored in this chapter, along with ways to approach and manage the major gift process, but when all is said and done, it is still the spirit behind the major gift process that determines its success. If, as major gift officers, we operate on the “push” or “scolding” model of development (Schervish, 200b, pp. 2-3) we will have neither long-term success in the field nor satisfaction in our work (see Exhibit 9.4). It is through Schervish’s “discernment model” that we respect donor wishes in the fund raising process. If we compete with other nonprofits for perceived limited charitable dollars, we will look like avaricious children squabbling over a parent’s estate. In major gift fund raising we must stay focused on long-term possibilities. We can not be distracted by immediate needs. Success in major gift fund raising comes from a vision for what the organization can become and what services it can provide in the long term with those major resources. We owe it to ourselves, our profession, and the dignity of donors to approach our work with the enthusiasm and respect it deserves. Schervish (2000b) helps us to do just that with his idea of “supply-side philanthropy.” This elegant theory postulates that it is not through competition for an illusory and limited “pie of philanthropy” but rather through inspiring individuals towards gifts of significance that the true growth of philanthropy will occur. This theory implies that the only limits to philanthropy are those that we impose on ourselves and our institutions through misinformed notions of this important work and the transforming effect philanthropy can have on the lives of our benefactors. If we follow Schervish’s advice and focus on improving the “quality of giving” over the “quantity of giving,” we will achieve both greater respect for the work of development and great philanthropic success in the process.

Exhibit 9.4. The Scolding and Discernment Models.

Scolding Model

Discernment Model

You must give . . .

- The right amount
- At the right time
- To the right causes
- In the right ways

- Is there something you want to do?

- Is there something you want to do for others?
 - Is there something that would offer you deeper identity and satisfaction?
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Source: Paul G. Schervish, *The Spiritual Horizons of Philanthropy*, in E.R. Tempel and D.F. Burlingame (eds.), *Understanding the Needs of Donors*, New Directions for Philanthropic Fundraising, no. 29. Copyright © 2000 John Wiley & Sons, Inc. This material is used by permission of John Wiley & Sons, Inc.

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