

From Transactional to Transformational

Leveraging Donor Identity to Build Trust and Make the Ask

Presented by Eric Frans, CFRE

Hosted by Instil and AFP Events

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Welcome & Overview

About Your Speaker

Eric Frans, CFRE

- Extensive experience in transformational giving for large Nonprofits.
- A champion of donor-centered cultures, with a focus on transformational giving and the neuroscience of trust.
- World Vision, Canadian Cancer Society, IFCJ, Women's College Hospital

Today's Session

- Presentation
- Q&R

Discover how identity-based fundraising rewires your approach — not just to raise more, but to build lasting trust and elevate donor lifetime value.

State of the Sector

3.1%

of donors

gave nearly 78% of total
donations (2024)

66%

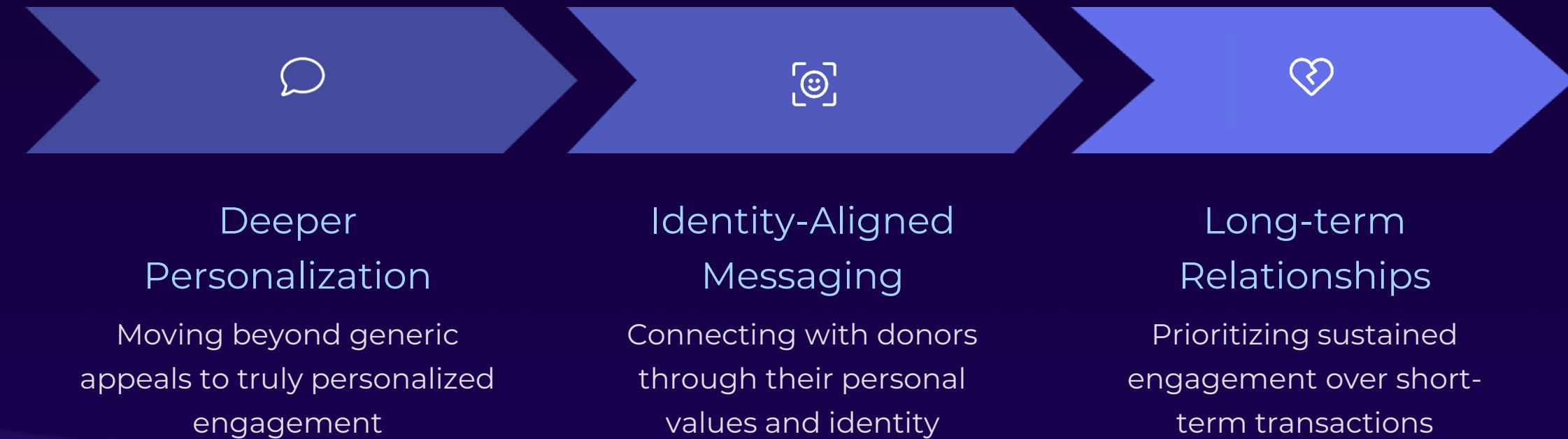
retention rate

for major donors -
room for improvement

We are in the midst of a giving concentration era: 78% of dollars now come from 3.1% of donors. Transformational giving isn't a trend — it's a survival strategy

Where Fundraising is Going

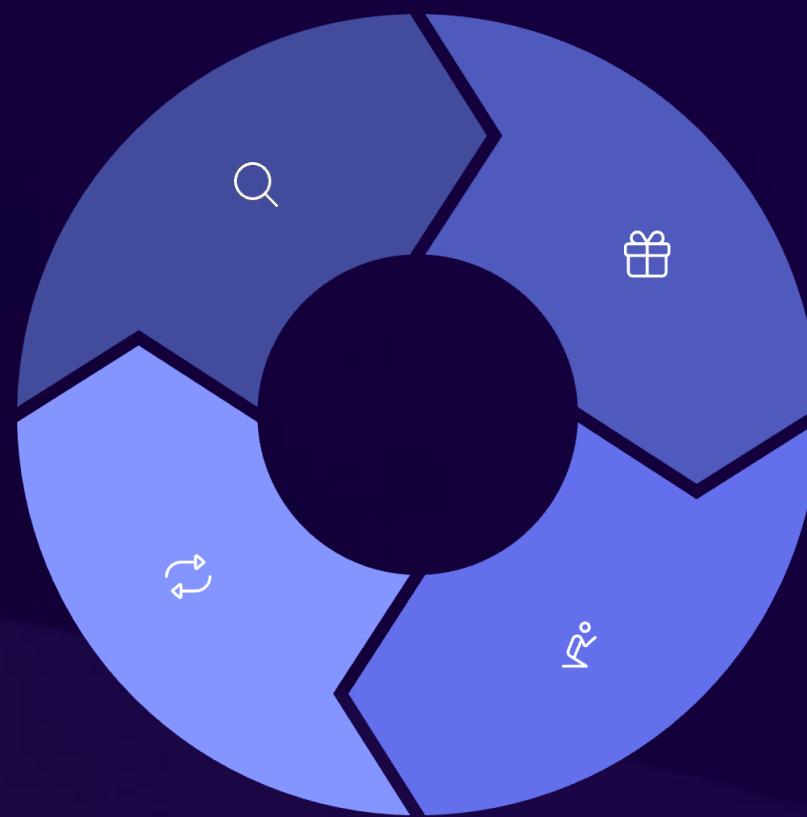
From Broadcast to Belonging: The New Rules of Fundraising



Enter: Transformational Giving + Donor Psychology

Transactional vs. Transformational

Transactional Approach



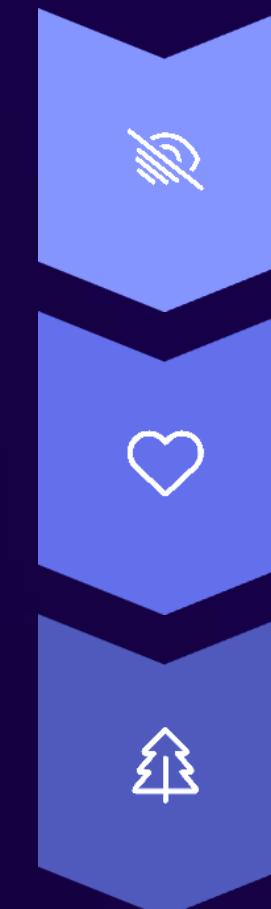
Q Appeal

Gift

Generic Thanks

Repeat

Transformational Approach



Shared Vision → Mutual Commitment

Emotional Resonance → Lasting Memory

Long-term Investment → Lifetime Value

What We Risk

Missed Major Gift Potential

Failing to identify and cultivate transformational giving opportunities

Shallow Engagement → Poor Retention

Without meaningful connection, donors quickly move on

One-and-Done Donors

Transactional approaches lead to single gifts without ongoing commitment or connection.

Donors Treated as ATMs → Mission Fatigue

Rather than valued partners in your mission

What Donors Really Want

Identity is the Interface

To Feel Seen,
Known, Valued

Donors want recognition
as individuals, not just
checkbooks

To Make a
Real Impact

They seek tangible
evidence their
contribution matters

To Express Identity
& Values

Giving is a way donors
say: 'This is who I am.' The
gift is their story.

Research: Donors give to reinforce who they are (philanthropic psychology)

The Psychology of Giving

Why do people give?

Understanding donor motivation is key to "Securing the Gift"

Identity Affirmation

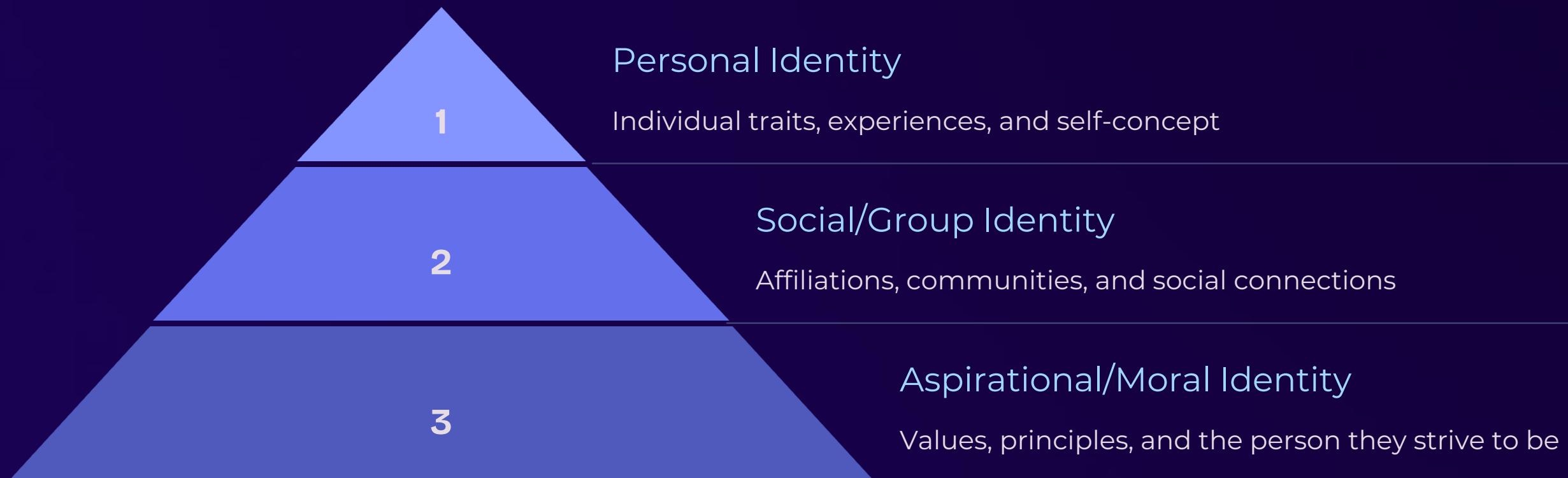
Donors are more generous when appeals affirm their identity

Giving triggers reward and meaning centers in the brain.

Philanthropy activates the brain's meaning-making circuitry: It's not just dopamine — it's identity reinforcement.

What Is Identity-Based Fundraising?

Identity-based fundraising is the art and science of engaging donors through their deepest sense of self — their values, affiliations, and aspirational beliefs



How to Listen for Identity Cues



Language Donors Use

Pay attention to specific words, phrases, and stories they share



Causes They Support

Look at patterns in their giving history and volunteer activities.



Values They Express

Note what principles they emphasize in conversations.

| Research everything they have ever said or written. Listen to them speak.

Case Study: Identity-Aligned

The Challenge

Long-time donor with consistent giving because they liked the organization, but had much more capacity.

The Identity Insight

Discovered donor saw themselves as an "innovation catalyst" in their personal and professional life.

The Outcome

A reframed narrative aligned with the donor's identity catalyzed a 3x increase in giving — without asking for more.

The Neuroscience of the Ask

Emotion Precedes Logic

The amygdala activates before the prefrontal cortex

Meaning Overrides Math

Identity-based relevance outweighs rational appeal

Identity Feeds Reward

When a donor's self-story is reinforced, the brain rewards the act of giving

Reframing the Ask

1

Old Frame

"Will you support X?"

Focuses on organization's needs rather than donor's identity

2

New Frame

"You are the kind of person who creates X. Here's how your story continues..."

Uses affirmation, shared language, and impact framing



Scripts & Techniques

Identity-affirming ask examples:

For "Innovation Champion"

"Your vision for cutting-edge solutions has inspired our new approach. Would you consider being the catalyst for this groundbreaking program?"

For "Community Builder"

"Few people understand the power of community like you do. Your leadership gift would bring together resources to transform this neighborhood."

For "Legacy Creator"

"The impact you've created over decades is remarkable. This endowment opportunity would extend your influence for generations to come."

- Use "you" more than "we,"
- Mirror donor language,
- Focus on emotional outcomes
- Use donor identity as your lens, not just your label. Let who they are shape how you invite them in.

CFRE tie-in: Preparing personalized, donor-focused solicitations

Use donor identity as your lens, not just your label. Let who they are shape how you invite them in.

Common Mistakes to Avoid

1

Asking Too Soon

Before understanding donor identity and motivations

2

Generic Asks

With no personal relevance or connection to donor values

3

Ignoring Donor Values/Motives

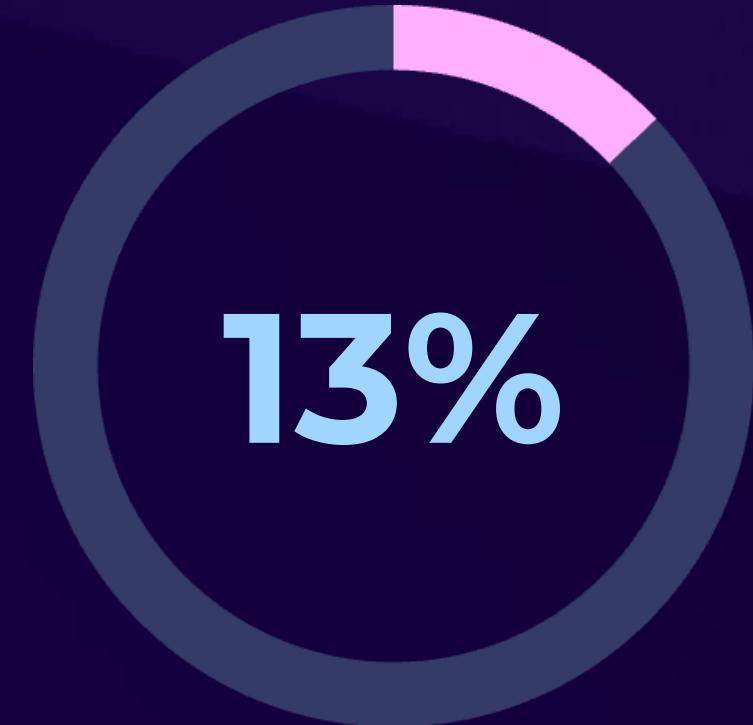
Focusing only on organizational needs

4

Treating All Major Donors the Same

Missing unique identity drivers and personal connections

Stewardship = Retention



- | Stewardship is part of the ask cycle
- Plan for personalized follow-up BEFORE you ask

of donors stop giving not because of bad programs — but because they feel invisible.

Recognition That Reflects Identity

Thank-you strategy should:

Match Donor's Values

Align recognition with what
matters most to them

Reinforce Identity

"You made this possible" -
connect their self-concept to
the impact

Invite Future Partnership

Frame the relationship as ongoing collaboration, not a completed
transaction

Organizational Culture Shift

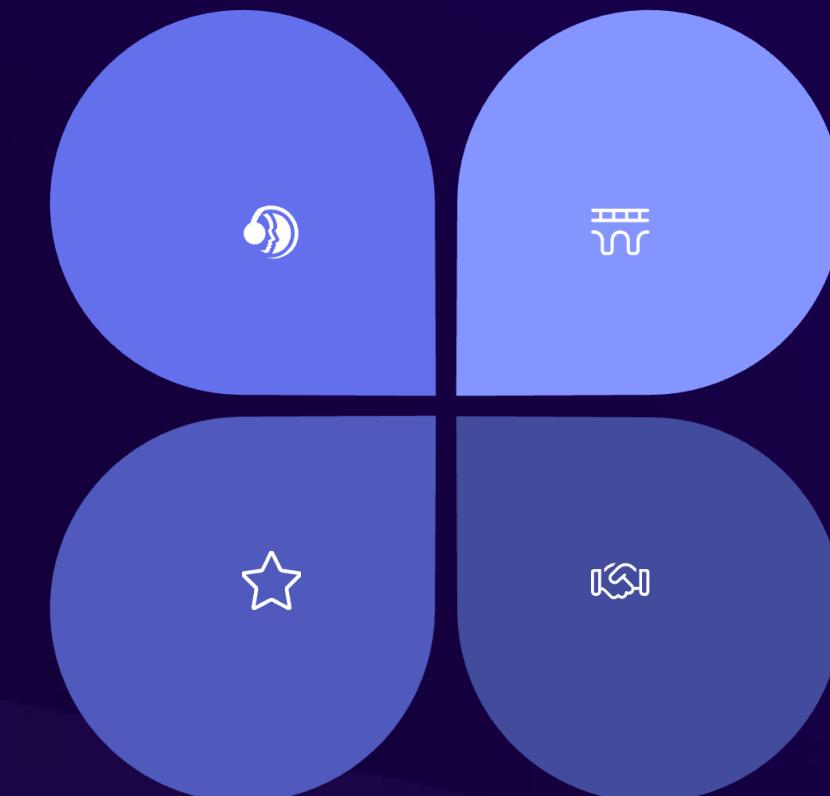
Transformational fundraising isn't a team — it's a culture.

Everyone Has a Role
In transformational giving

Donor-Centered Culture
Throughout organization

Development Can't Be Siloed
Integration across departments

Philanthropy as Partnership
Not transaction



Your Next 3 Steps

Transformation doesn't happen in theory. Here's where to begin today.

Identify Identity Drivers

Review your top 10 donors in your portfolio and identify their key identity motivations

- What language do they use?
- What causes do they support?
- What values do they express?

Rework One Solicitation

Take an upcoming ask and realign it with the donor's identity

- Use their language
- Connect to their values
- Frame impact in identity-affirming ways

Review Stewardship Strategy

Evaluate your major donor stewardship - is it truly personalized and reflects what you know about your donor?

- Does it reflect their identity?
- Does it reinforce their impact?
- Does it invite partnership?

Transformational Giving in Practice

Before (Transactional)

- Generic appeals
- Organization-centered language
- Focus on financial need
- Standard recognition

After (Transformational)

- Personalized engagement
- Donor-centered language
- Focus on shared values and impact
- Identity-affirming recognition

The shift from transactional to transformational isn't just about language—it's about a fundamental change in how we view and engage with donors.

Redefining ROI: The Metrics that Matter Most

1

Beyond Dollars Raised

Track retention rates, upgrade percentages, and lifetime value

2

Relationship Depth

Measure engagement, volunteer involvement, and advocacy

3

Donor Satisfaction

Survey donors about their giving experience and sense of impact

Success in transformational giving requires new metrics
beyond traditional fundraising KPIs

Identity-Based Fundraising Tools

Discovery Tools

- Donor interviews focused on values
- Identity mapping templates that guide meaningful discovery
- Giving motivation surveys
- Research

Communication Tools

- Identity-aligned messaging templates
- Personalized impact reporting
- Value-based storytelling frameworks

Overcoming Common Challenges

"We Don't Have Time"

Start small. Start smart. Your top 10 donors will return the investment

"We don't have tools to track this"

Begin with simple notes fields; advanced tracking can come later

"Our Board Doesn't Get It"

Share case studies and ROI data; demonstrate with one success story

"We're Too Small"

Smaller organizations often have deeper relationships - leverage this advantage

Key Takeaways

Identity Drives Giving

Donors give to express and reinforce who they are

Frame Asks Around Identity

"You are the kind of person who..." is more powerful than "Will you support..."

Listen Before Asking

Understand identity cues to personalize your approach

Stewardship Reinforces Identity

Recognition should affirm who donors are and the difference they make

Thank You + Q&R

Contact Information

Eric Frans, CFRE

Email: [email address]

LinkedIn: [profile link]

Resources: [link to follow-up materials]