

From Transactional to Transformational

# Leveraging Donor Identity to Build Trust and Make the Ask

Presented by Eric Frans, CFRE

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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%

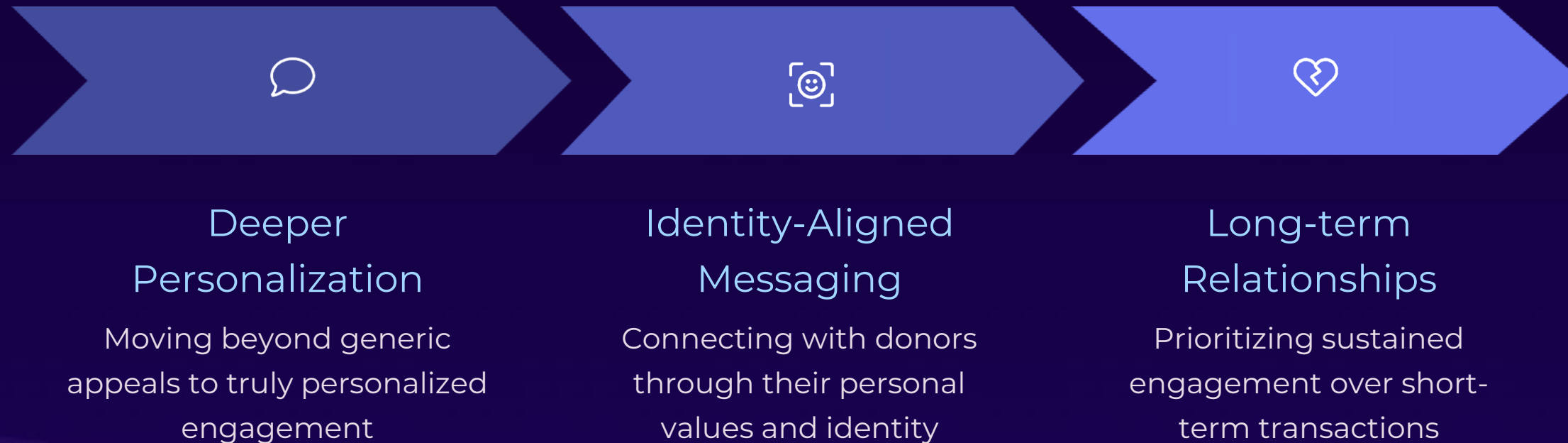
retention rate

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



Appeal

Gift

Generic Thanks

Repeat

Transformational Approach



# 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

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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

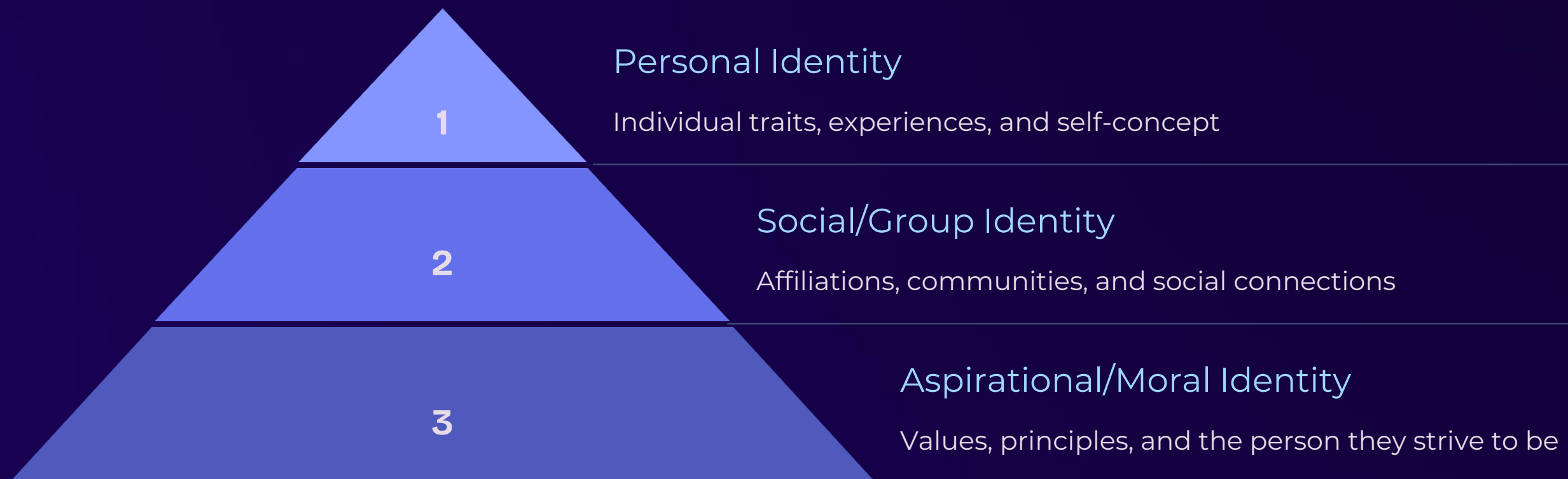
Giving triggers reward and meaning centers in the brain.

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

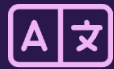


# What Is Identity-Based Fundraising?

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



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

# 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

# Common Mistakes to Avoid

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**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

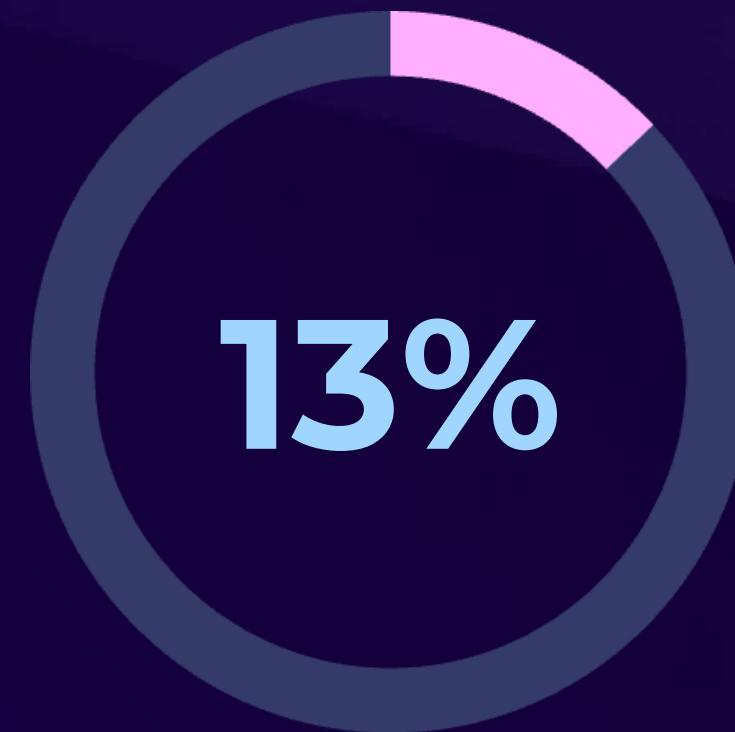
Focusing only on organizational needs

**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



Development Can't Be Siloed  
Integration across departments

Donor-Centered Culture  
Throughout organization



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 donors 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

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## Contact Information

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Resources: [link to follow-up materials]