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# Donor Archetypes: A Practical Guide to Building Belonging

**Webinar (60 minutes)**

December 17, 2024

10:30 a.m. PDT/12:30 p.m. CDT/1:30 p.m. EDT



**LIPMAN  
HEARNE.**



# Alford Group



## Accelerating impact

Full-service consultancy.


Tailored solutions.

- Fundraising
- Strategic & Organizational Planning
- Governance & Leadership Development
- Interim Staffing
- Data Management, Analytics & Assessment
- Equitable & Inclusive Culture

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## **Land Acknowledgment Chicago, IL**

Chicago is located on the traditional unceded homelands of the Council of the Three Fires: the Ojibwe, Odawa and Potawatomi Nations. Many other tribes such as the Miami, Ho-Chunk, Menominee, Sac and Fox also called this area home. The region has long been a center for Indigenous people to gather, trade and maintain kinship ties.



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## Webinar Logistics

- Recording and resources available
- Survey
- Listen-only mode
- The chat is open!
- To ask a question, please use the Q&A function

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## Moderator



**Jaron Bernstein, MBA**

he/him/his  
**Senior Consultant**  
Alford Group

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## The Experts



**Colleen O'Grady**

she/her/hers

**Vice President of Philanthropic Strategy**

Yes& | Lipman Hearne



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**Senior Vice President of Strategic Planning**

Yes& | Lipman Hearne



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December 2024

**Donor Archetypes:**

A Practical Guide to Building Belonging

# Yes& Lipman Hearne: a Marketing and Branding Agency



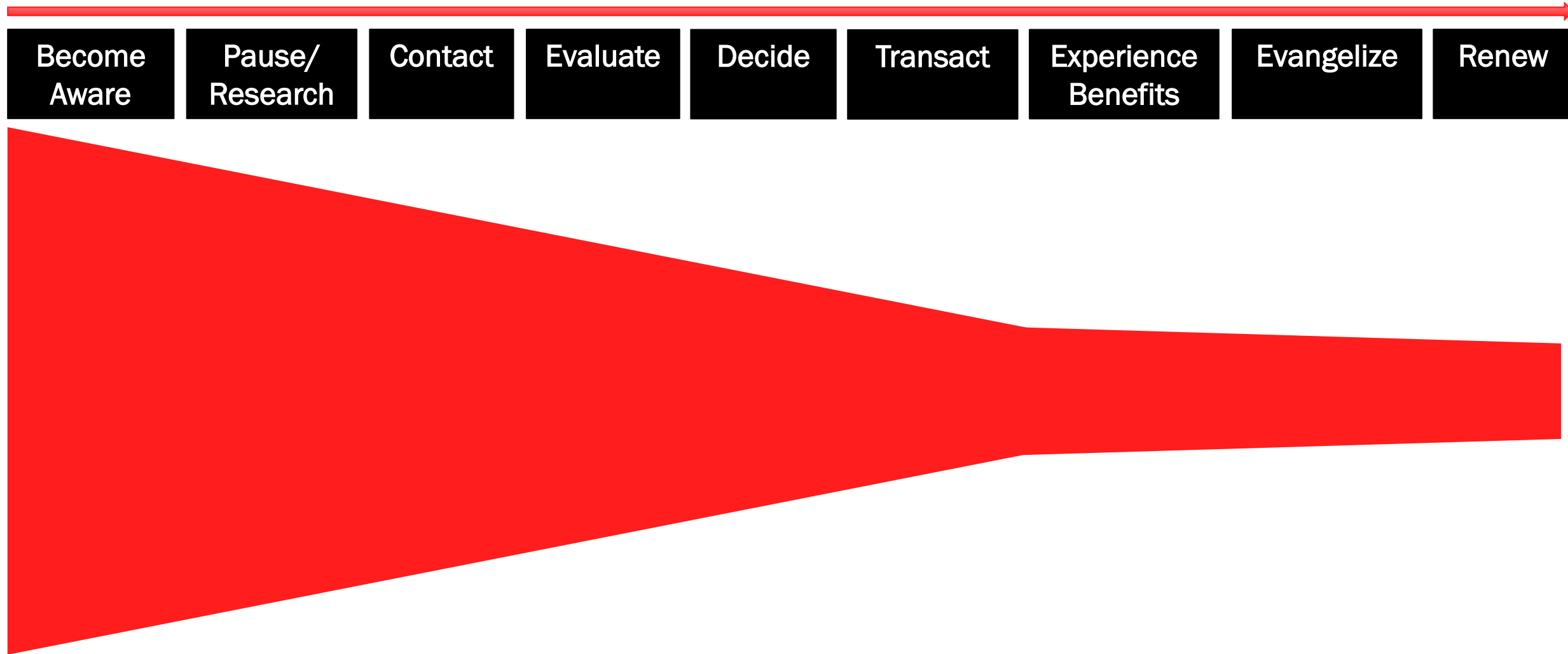
Design/Creative  
Strategy/Planning  
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Website Design/Build  
Events  
Public Relations  
Social Media  
Research  
Print/Environmental  
Video/Animation



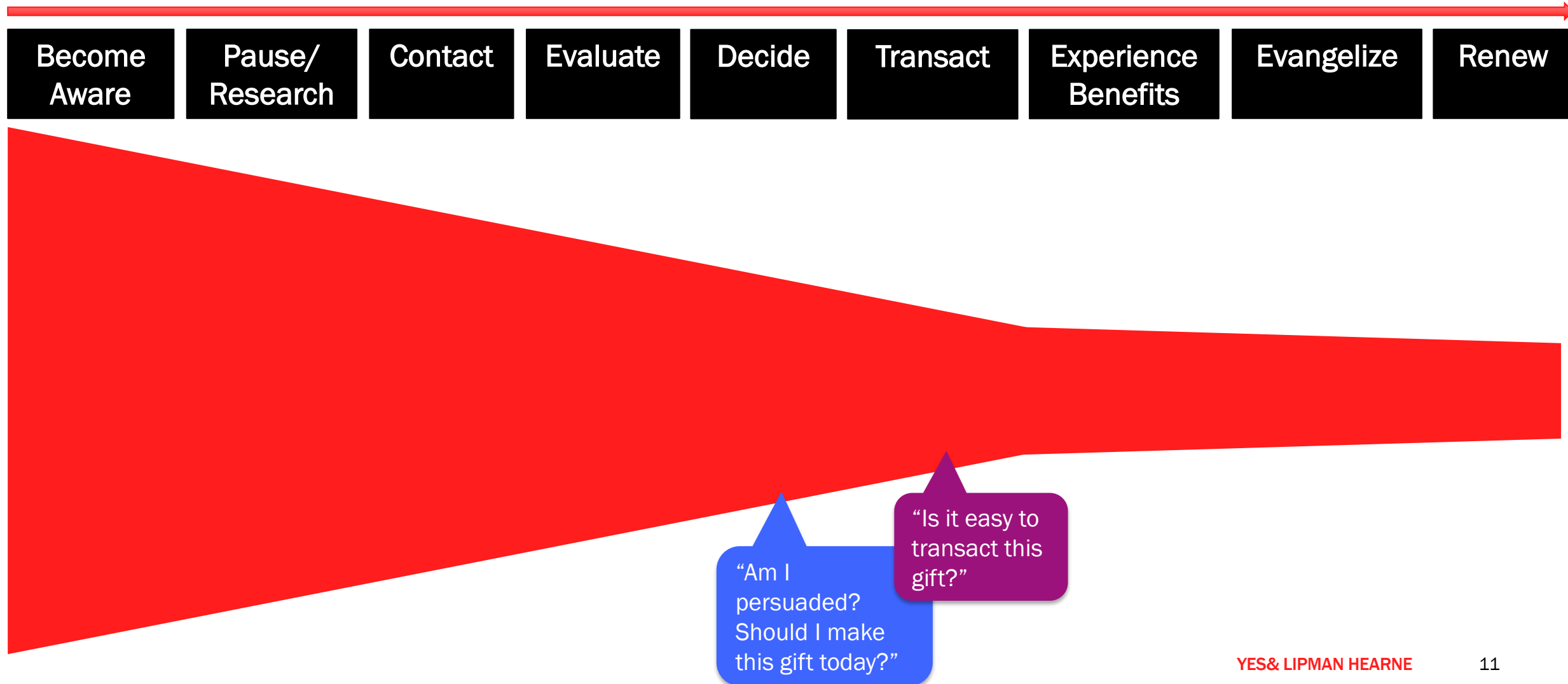
Building Belonging  
in a Marketing Context:

**CENTERING  
INDIVIDUAL JOURNEYS**

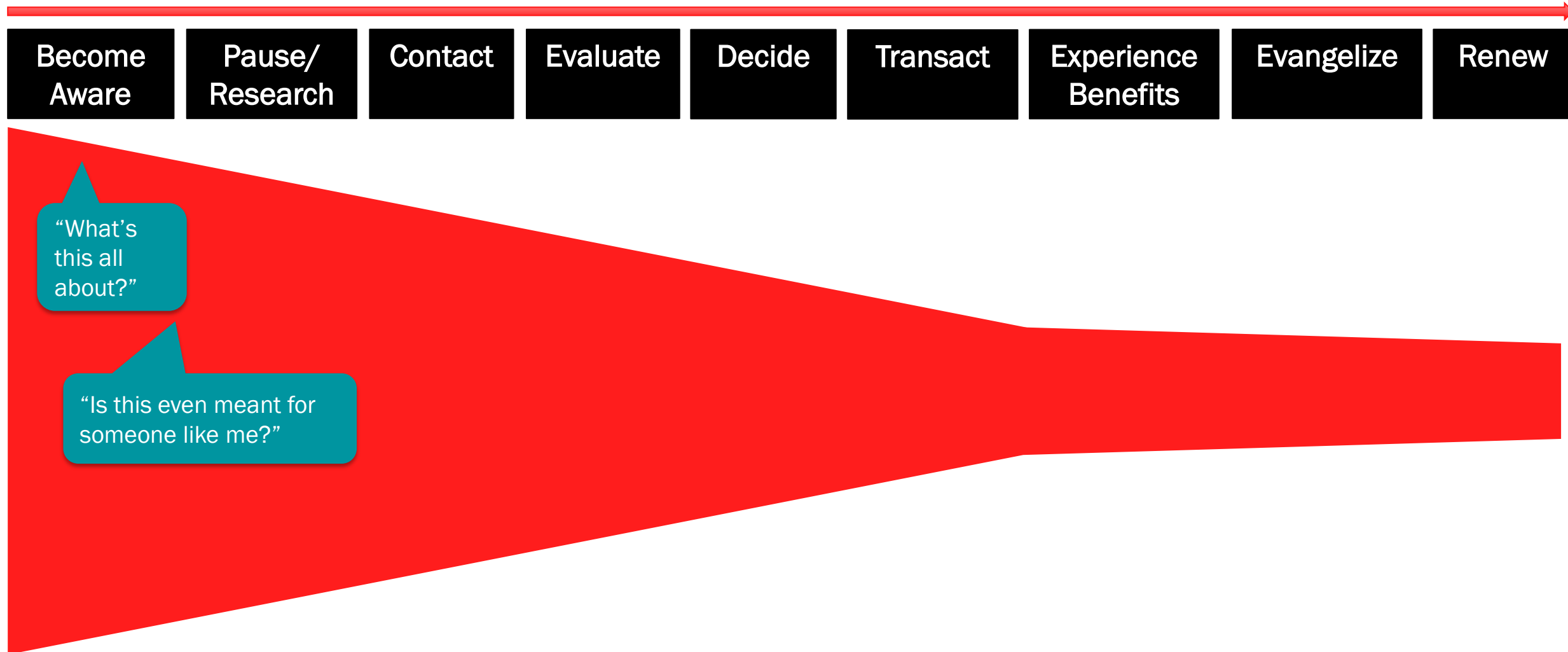
# Building Belonging by Centering Individual Journeys



# Building Belonging by Centering Individual Journeys



# Building Belonging by Centering Individual Journeys



# ARCHETYPES:

Recurring Characters Our Brains  
Recognize

# Archetypes: A tool to help you build belonging



# Archetypes in Media and Culture



**The Scholar**



**The Warrior**



**The Eccentric**

# Poll



What nickname has this Olympic gymnast been known by?

- A. The Specialist
- B. Pommel Horse Guy
- C. Clark Kent
- D. Spider Monkey
- E. Paul



# Poll



What nickname has this Olympic gymnast been known by?

- A. The Specialist
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- E. ~~Paul~~

# Archetypes:



# 9 EXAMPLES

## donor archetypes

# ■ Donor Archetypes: Sources and Methods

- Close reading of personal statements from 245 Giving Pledge signers
- Media coverage of gifts and giving
- Social listening

# Nine Donor Archetypes

1

The Closer

2

The Strategist

3

The Enthusiast

4

The Explorer

5

The World-Builder

6

The Power Shifter

7

The Calculator

8

The Free Spirit

9

The Helper

# Donor Archetypes:

## INTRODUCTIONS

### The Closer

1

Brings rarified expertise or specialized resources few others can offer

### The Strategist

2

Wants to help while getting to the root of an issue

### The Enthusiast

3

Values novel experiences and the people they meet along the way

### The Explorer

4

Mindful of risk; wants to proceed gradually while learning

### The World-Builder

5

Sees nonprofits and NGOs as instrumental to advancing some agenda

### The Power Shifter

6

Wants to correct imbalances of power and agency while giving

### The Calculator

7

Wants their giving to be objectively effective and efficient

### The Free Spirit

8

Likes doing things differently, building movements, defying norms

### The Helper

9

Values making an immediate impact and the feeling of helping

# Donor Archetypes: MANTRAS

## The Closer

1

"This is my time to shine. I bring something special to this situation."

## The Strategist

2

"I'm committed to understanding this problem at a macro and micro level."

## The Enthusiast

3

"This brings me joy and happiness. Being involved enriches my life."

## The Explorer

4

"Making a difference takes care and thought."

## The World-BUILDER

5

"This advances my agenda."

## The Power Shifter

6

"People who are closer to this issue than I am know best—and deserve trust."

## The Calculator

7

"I'm more confident when I can objectively measure and compare options."

## The Free Spirit

8

"Let's mix things up! Maybe another way is better."

## The Helper

9

"If I can help in some small way today, why not do it?"

# Donor Archetypes: QUESTS

## The Closer

1

Move the needle  
(single-handedly or by  
rallying others)

## The Strategist

2

Add to the volume of  
knowledge while  
making a difference

## The Enthusiast

3

Enjoy & reflect on novel  
experiences, build  
quality relationships

## The Explorer

4

Gather knowledge,  
learn the context, avoid  
missteps

## The World-Builder

5

Leverage advantages &  
resources toward some  
vision of their own

## The Power Shifter

6

See & correct power  
imbalances; listen &  
adjust

## The Calculator

7

Propose & test  
measurement methods;  
maximize impact

## The Free Spirit

8

Model novel approaches  
(inject chaos), rebel,  
generate conversations

## The Helper

9

Stay open to ways to  
help, develop a sense of  
gratitude & abundance



# Donor Archetypes: **PERSONALITIES**

## The Closer

1

Courageous, insightful,  
comfortable taking  
risks

## The Strategist

2

Inquisitive, diligent,  
skilled, patient, focused

## The Enthusiast

3

Open, friendly,  
responsive, thoughtful

## The Explorer

4

Humble, curious,  
capable but cautious in  
new territory

## The World-Builder

5

Self-driven,  
comfortable wielding  
power

## The Power Shifter

6

Mindful of power  
dynamics, bold at times,  
at ease with ambiguity

## The Calculator

7

Brainy, earnest,  
exacting

## The Free Spirit

8

Rebellious, playful,  
welcomes attention

## The Helper

9

Generous, big-hearted,  
doesn't overthink things



# Poll

Which of the 9 archetypes resonated most with you personally?

1. The Closer
2. The Strategist
3. The Enthusiast
4. The Explorer
5. The World-Changer
6. The Power Shifter
7. The Calculator
8. The Free Spirit
9. The Helper

# ASSEMBLING YOUR STORYTELLING TOOLKIT

Gather your team—insiders who know your donors, those who will be tasked with making stories visible—for three 45-minute brainstorming sessions. It's okay to break it up over the course of several weeks!

**Session 1:** Channels & Vehicles

where and how you will share stories signaling varied approaches to giving

**Session 2:** Story Elements

the attributes and details found in the stories you might tell

**Session 3:** Source Material

prompts for gathering additional content to support richly varied stories

# 1. CHANNEL & VEHICLE INVENTORY

Make an inventory of the channels you might realistically use to make varied stories of impact and motivations visible to potential donors. Brainstorm with colleagues. Start with a few channels—then plan to repurpose content from one channel to another.

CHANNEL TYPE	EXAMPLE	CADENCE/TIMING/REACH	CONTENT REQUIREMENTS	EFFORT INVOLVED 1 (EASY) - 4 (HARD)
Short-form social media	Series of Instagram grid posts	<i>2 per day for 8 days x 4 campaigns per year x 3,500 followers</i>	Compelling images or graphically treated quotes or fun facts, each with a caption that elaborates	<i>Gathering &amp; preparation: 3-4 Posting &amp; engaging: 2-3</i>
Long-form social media	Q&A with a program insider suitable for LinkedIn	<i>1 per month for 12 months x 1,250 followers; share links in emails, newsletters, etc.</i>	Interview transcript that can be edited and crafted into a post	<i>Gathering &amp; preparation: 2-3 Posting &amp; engaging: 1-2</i>
Video	Compilation of testimonials to share at an event		Variety of perspectives & personalities captured on video	
Direct	eNewsletters, direct mail, email		Features/profiles, donor quotes, annotated infographics	
Long-form web/print	Alumni magazine, annual report		Feature stories, infographics series, photo albums, timelines	
Short-form web/print	Alumni magazine, annual report		Donor quote sets, sidebars, fast facts	
Earned media	Press releases, pitches, op eds		Newsworthy announcement and/or timely framing	
Other	One-on-one or small group meetings		Verbal anecdotes, talking points for presentations/meetings	

## 2. STORY ELEMENT INVENTORY

Make a list of stories you might tell about donors, their involvement, their decision-making, their impact, and programs benefiting from support. Which stories have elements that might resonate with different points of view? Brainstorm with colleagues.

DONOR NAME & GIFT	A donor's emotional experience; joy or exuberance	Elements of risk or leverage	Strategic pivoting over time	A donor's initial learning journey	Disruption, innovation, irreverence	Less prescriptive, focus on trust	More prescriptive, focus on evidence	Long-term or big-picture impact	Immediate impact of any kind
Jaime Perez student food pantry "gift mob"	✓				✓				✓
Brianna Smyth gift to archivist education			✓				✓	✓	
Drexel Blvd Giving Circle gift to veteran housing				✓		✓			

# 3. SOURCE MATERIAL GATHERING

Once you’ve generated a varied list of promising donor stories, prepare to add to what you know and what you can share about each donor’s motivations, perspectives, and experiences. You will be framing these donor stories with the lens of an archetype, but you should let their unique personalities and truths shine through.

## CONVERSATION STARTERS FOR DONOR INTERVIEWS:

What would you tell people is the most challenging aspect of giving—in general, and in your specific area of interest?

In your experiences giving and volunteering, what has surprised you most? Was there an experience that changed how you thought about giving?

Who were some of your role models, growing up? What lessons from parents or mentors have stayed with you?

What is a change you hope to see realized within a decade? What about the next three years?

How do you stay up to date about issues you care about?

What or who inspires you?

If you could wave a magic wand, what would be different for the nonprofits you support? What about nonprofits in general?

When you first learned about this organization and the work we do, what were your impressions? Have your impressions changed over time?

In a few words, what do you want your giving to accomplish?

What’s a special skill or perspective you bring when it comes to supporting programs and organizations important to you?

What are you mindful of avoiding in your philanthropy?

When you describe this organization/program/purpose area to someone who isn’t familiar with it, what do you say?

What’s one thing you want others to know about this organization/program/purpose area?

# THANK YOU

# Questions?



# Q&A





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