

## Tom Dauber

Good morning!

Before we dive into today's topic, let me share a little bit about myself. I'm a Central Ohio native and a proud graduate of Johnstown Monroe High School and Bowling Green State University. But my real education came from the nearly three decades of working in higher education, faith-based and healthcare fundraising.

I presently serve as Chief Advancement Officer for Door International, and I'm also the founder and president of the Abundant Vision Philanthropic Consulting, where I provide coaching and consultation services for major gift work and fundraising campaigns.

I also host a podcast called the Abundant Vision Fundraising Podcast. My podcast is full of interviews with fundraising veterans and helpful advice about fundraising. My show is available on Spotify, Apple, YouTube, and most places where podcasts can be found.

As you can tell, I keep very busy, but when I'm not focused on the fundraising world, I'm trying new restaurants with my brilliant wife, traveling to places, going hiking, running with my dogs, or spending time with our four adult children.

My professional life has been deeply shaped by both personal and family experiences, with money and with asking. Like many of you, my journey has included moments of real struggle, And moments of breakthrough. Sharing those experiences is important to me because they form the backdrop for why I believe so strongly in helping people overcome the barriers that prevent us from fundraising with confidence.

My hope is that we will connect today, not just around the topic of fundraising, but what it means to think of ourselves holistically, and how all the experiences of our lives shape our fundraising.

Now, before we get too far in. Let me give you a roadmap for where we're going today.

We're going to explore how to solicit financial support from a place of confidence.

Our experience of confidence comes from many different places. This can include our family and cultural background, our psychology, and even our understanding of our organization. They all shape the way we view asking, Money and generosity.

I'll share some personal stories from my own journey as a fundraiser, and we'll pause along the way for you to reflect on your own experiences. We'll also explore ways we can develop greater fundraising confidence, so that we can inspire philanthropy with bold asks and big, clear vision.

Lastly, we'll talk about the role of the CEO. Why it's so important in fundraising, and how strategic coaching and peer mentoring can put you on the fast track to fundraising success. By the end, my hope is that you'll walk away with a clearer understanding of how your background impacts your fundraising. And more importantly, some practical ways to move forward with confidence and freedom in your asking.

I want to stress again. Today, I'm going to be asking you some important questions for reflection during this presentation. These are going to be very personal questions. I'm not looking for responses, but I do really hope you'll take time to engage with your own heart and answer them. Thinking about these questions is going to position you to fundraise with confidence.

Now, As I mentioned, our personal backgrounds play an outsized role in how we see the world and how we view money. I grew up in a home where I was afraid to ask. We were very poor, and it was unacceptable to want things for yourself.

One time, when I was in 6th grade, I saw a brand new Nintendo game cartridge in the back of a car, still in its plastic wrap and everything. It seemed very expensive to me, and I was worried that my parents were spending too much on me. And for a game I wasn't particularly crazy about. I tried to explain this to them in hopes of saving them money, and I got grounded for a month for presuming that the video game was for me.

Now, for me, this was one of those moments that shaped my psyche and the way I saw the world. My personal background, my family history, taught me that I should hide my needs, and to be very careful if I was going to express them.

Now, Fast forward to my first fundraising job. I was raising monthly pledges, working for Central Ohio Youth for Christ. I got a meeting set with one of my mentors from college. I intended on asking him to make a pledge, but after spending hours talking about the work my organization was doing, and my part in it. I just couldn't do it. There was this awkward silence. I thanked him for his time. And I left. I drove 2 hours home, asking myself. Why hadn't I been able to pull the trigger?

I had quite a bit of experience speaking in front of groups, and even sending solicitations by mail. I felt like... I was a strong communicator, but to my surprise, I discovered that the lessons that I had learned as a child had given me a real fear of asking for money. Especially for pledges that would go to directly support me and the work I was doing.

I'm betting we've all had moments like this. When we miss the opportunity to make an ask, out of fear. The connection between my childhood beliefs and my reticence to ask took me time to understand. But some of you may not have taken the time to consider this. So I want to pause for a moment now.

And I'd like for you to either take out a piece of paper, or if you're on your computer, which I guess all of you are, to pop out, you know, a word processor or something, and just write an answer to this next question. Just for a few seconds. Take a moment to think back to your own first fundraising ask. Or even when you ask for something as a child, How did your family, your community or your culture shaped what it meant to ask.

Was asking bold? Rude? Honorable? For me, understanding that I had some baggage to deal with was the first step towards overcoming my fear of asking. So how did I do this? One thing I learned was to center myself in the good work my organization was doing, rather than my own self-perception.

What do I mean by this? Well, in my case, I had some insecurities about my self-worth. But one way I found to get around it was to just take that off the board entirely. I had to remind myself, before every solicitation. That my work wasn't about me and my value. It's about the value of the mission, the value of the impact, and the value of the people we were trying to help.

So if you're struggling with fears of rejection or other anxieties about how you'll be received as a fundraiser, I'd encourage you to ask yourself some questions:

- Is the mission of my organization a good one?
- Do I really believe in it?
- Is it worth supporting?
- Will people feel good knowing they've helped this cause?

Now, I'm hoping that all of you are working for organizations that you really believe in and really want to see succeed. If not, That's another presentation for another time.

But if you can answer these questions affirmatively, and have a clear understanding of why you feel those ways. Then you, too, can remind yourself before each solicitation of the truth of your situation. This ask isn't about you or your emotional baggage. This ask is about your mission, and making a difference in the world. This can really be transformational.

So as I did that over and over and over again, I ultimately was able to develop a real comfort level with asking people directly for support. And that's one of those things that tends to snowball. The more support you solicit, the more confidence you gain. And the more people you ask. And it just builds on itself from there.

Another reflection question for us: I'd like for you to write down one sentence about why your organization's mission matters to you personally. I'll give you just a little more time for this one.

So... I spent 8 years in that fundraising context asking individuals for monthly pledges, and making essentially minimum wage doing it. I was broke. Desperately broke. During those years, I got married, had a child and even had a second on the way, and we were a one-income family.

Even with the help of WIC, we just couldn't keep food on the table. The one thing that kept us fed was some friends who volunteered for a local food pantry. They would actually go to Panera, pick up day-old bread and pastries, and then swing by our home so that we could have first dibs on whatever they picked up that day.

As a dad and as a husband, you can imagine, this was an incredibly hard time of my life. You see, I carried Real baggage from my childhood about finances. My mom was terrible with money, she ran up credit cards. My stepdad didn't make much, and...one time, I remember even having to sell some of my favorite toys in a garage sale just to help pay the electric bill that month.

There was all this stress and scarcity mindset about money growing up. To find myself in a similar position, to see my daughter going through the same sorts of things I experienced was really, really tough. Now, the net result of this was that I had a view of money that was deeply tied to scarcity. To me, at the time, \$25 seemed like so much money.

On the occasions that I did find someone who would donate \$100 or more a month. I was blown away. I couldn't imagine anyone having that type of room in their budget. Even when I was rooting myself in the importance of my organizational mission and was willing to make the ask, it was hard for me to really believe that there were people who could afford to give more than \$100 a month, and so I never asked for more than that.

Another question for you: Think of a time when your financial situation, or your family's, or communities, Made it hard to imagine Soliciting larger gifts. What limiting beliefs came from that experience?

Well... When I finally left Youth for Christ and began working for The Ohio State University—I hope my friends in the audience from Georgia will forgive me for that reference—but my scarcity mindset very quickly presented a barrier that I couldn't avoid dealing with.

I had been used, used to soliciting donors for \$25. Now I needed to become comfortable with soliciting donors for \$25,000. My Chief Development Officer did something brilliant to help me. I'd been cultivating a particular donor to death. We had met 3 to 4 times too many, in part because I was fearful of bringing the conversation to a head.

I needed... \$100,000 to fund this program that this donor was interested in seeing the college start. But I could tell from our interactions that it was unlikely that he was going to give anything at all. He was the sort that viewed his wisdom and guidance as all the gift anyone could need. So my boss sits me down and tells me: “You are going to ask Dr. Smith for \$100,000 at your next meeting. You've done the work, You've identified his interests, you've built the relationship, Now go do it!”

So... I drove an hour to have lunch with him, and his assistant, and we walked through the project. And just as we got to the end, where I had prepared to say something brilliant, like, “Dr. Smith, you've been so helpful in guiding the college to help us create an actionable plan for alumni mentoring to help our students. But we don't have the budget to fund all of it. Would you be willing to pledge \$100,000 to help us bring this program to fruition.” Sounds great, right?

Only, that's not what came out. Instead, that last part sounded something like this: “Would you be willing...(gulp) to help pledge \$100,000?” It was awful!

He, of course, declined. And once again, I had a long drive home, to reflect on why I had such a hard time talking about giving. Now... Getting over this didn't happen overnight. But the first step I needed to take was definitely soliciting someone I knew who would turn me down, and seeing firsthand that it was okay. No one was mad at me. My honor was intact. I had done my job, and now I could move on to other people. It was okay to get a no.

In fact, I eventually came to realize that the quicker I could get to know the more efficiently I could do my job. This helped me have the courage to keep asking. And eventually, I came to see that there really is a percentage of people in this world who have \$100,000 to give. And who would very much like to give it to a worthy cause.

Now, the more I interacted with these people, I began to develop a real belief in philanthropy, and the understanding that there is no lack of money in the world. There's only a lack of vision. This helped move me from having a scarcity mindset to having what I call, and what many other people call, an abundance mindset, a mindset that believes deeply that the world is full of people who care, and who want to make a difference with their money. If we can only show them how to do it.

So...the answer, if this is something you're dealing with, if you're afraid to ask, if you're fearful of rejection, the answer is practice. A lot of practice. So today, I could sit down with anyone and fearlessly explore with them if a six-figure or even 7-figure gift to a particular cause might make sense to them. What's the difference? Today, I understand that any potential gift isn't a statement about who I am, for good or bad.

If they give, it's not because I'm a good person, it's not because I'm worthy of their gift, and it's not a statement about their approval of me. It's because of the cause. It's because of the impact. It's because of the mission. Furthermore, I now understand that it's unwise to project my experiences of wealth and money on other people. If I do, I'm bound to get it wrong. My job isn't to assume ANYTHING. For a prospective donor, my job... Is to ask good questions, to listen carefully, so that I can come to an accurate understanding of what an individual is thinking about philanthropy.

Rather than being afraid of discovering someone doesn't have donative intent or major gift capacity. I'm actually glad to know it. It saves so much time. I can bless and release that relationship, and move on to other people who may be in a different place.

Now, I'd like to take a moment and consider a story that illustrates how even the most ideal situation can go sideways when we project our own money issues on a donor. I call this one A Tale of Two Deans. The college knew the alumni well. He was a donor of record who had given gifts as large as a quarter million dollars, and was one of the most generous donors they had.

College leadership knew with great certainty that the donor could give many times a quarter million dollars. Even better, the college dean, we'll call him Dean Number One. He had a 30-year history with the donor, and had even been his professor. Furthermore, the donor's PhD advisor was like a father to the donor.

The advisor was retiring, and Dean Number One knew this was the perfect time to ask the donor and to create an endowed chair to honor that advisor. This is the type of situation we as fundraisers all hope for. The right ask, at the right time.

So a series of conversations, emails, and phone calls took place. Ultimately, a proposal was shared, and in the pivotal conversation, the dean had just one job: Ask for \$2.5 million. All of it. All at once. It was a scripted conversation.

When the moment came, Instead of asking for a \$2.5 million gift, Dean Number One bulked and ask the donor to give the \$2.5 million over 5 years. In the crucial moment, his fear got the best of him, and he didn't have the courage to ask for the full amount up front. A few years later, another Dean. We'll call him Dean Number Two came along.

Now, Dean Number Two, after getting to know the donor, set up a meeting to discuss the pledge and to explore if it could be paid off more quickly. He discovered that the donor had already taken the \$2.5 million and put it in a special account to pay the pledge and could have actually paid it off at any time. It became very clear that Dean Number One had misjudged the situation.

So why did Dean Number One bungle the ask? Well, when we consider his background it became very clear, very quickly. Dean Number One was from a humble farming background and came from a family culture where people took pride in making do with what they had. He didn't like to make waves, or to risk upsetting people. His anxiety about asking for too much in fear of seeming pushy, caused him to fumble what was otherwise the perfect opportunity to make a powerful ask. Fortunately, his successor, Dean Number Two, was not operating out of fear or worry. He was fundraising from a place of confidence, clarity, and vision. And that's what we're going to explore next.

Confidence and vision are crucial when you're fundraising. Vision is magnetic because it gives donors a role to play. When someone writes a large check, they're saying, I see myself in that story. That's why the most powerful ask you can ever make isn't, will you help us meet our goal? It's, will you join us in building this future? And that future has to be painted in color. Numbers alone don't inspire generosity. People need to see the movement. People need to see the change.

The more tangible and emotionally grounded your description. The easier it becomes for donors to imagine their impact. But...and this is critical...casting big vision requires emotional steadiness. The fear of rejection, anxieties about budgets, constant comparison to larger institutions, all of that noise can pull a leader back into a vision that's small. Confidence is what keeps you from shrinking the dream. It's what lets you stand in front of a donor and say, we are building something worthy of your trust, without flinching.

Now, Dean Number Two, in this story didn't just ask if it were possible to accelerate the pledge payments. He explained to the donor that there was a brilliant scientist who could be recruited right now, whose presence could transform the school's entire research enterprise and attract millions more in NIH funding, commercialization opportunities, and even internal investment from the university.

But if he had to wait 3 years for the remainder of the pledge, it was unlikely that he would still be available, and that opportunity would be lost. Dean Number Two, cast a vision. He explained the clear difference that this gift could make right now. And this allowed him to make the successful case for why this donor should accelerate his pledge payments.

Here's the truth. A vague vision may make a donor suspicious, even. But a clear one makes them excited, even brave. When a donor senses that leadership knows what's going on, and how it will get there, the risk in giving feels smaller. They see not just potential, but capability. And when you describe how their specific gift fuels that capability, The abstract becomes personal.

That is why CEOs and executive directors have to take ownership of articulating vision. Even the best written case statement can't substitute for the authority and authenticity that comes from the person at the top. Donors want to hear it from you. They want to look across the table and see conviction in your eyes. Now, we'll talk more about how CEOs are every organization's best potential fundraiser, but we're going to move on to something else for the moment.

Now...vision doesn't mean grandiosity. It doesn't mean pretending your organization is larger or more powerful or influential than what it is. True vision is about focus. It's about naming the difference in your organization that it's uniquely positioned to make and describing it in vivid, human terms, fleshing out clearly both the immediate impact and the downstream implications of that impact.

When I coach nonprofit leaders, I ask them to finish this sentence. If we succeed, What will be different in the world? Then I asked them to think even more broadly by asking them, what will change in the world today and in the future, because of that difference. These questions cut through jargon and force clarity.

It's not about what you'll build or how much you'll raise, it's about what will change. Once a leader answers these questions, everything else falls into place. Strategy, staffing, budgeting, communication. All of it aligns around that central picture.

So, here's another reflection question for you: If your organization succeeds, what will be different in the world? What will change in the world today, in the future because of that difference. You can test the strength of your vision by asking 3 follow-up questions.

1. Can you describe it in one sentence, without using internal jargon?
2. Can your board members repeat it accurately?
3. Can a donor picture what success looks like?

If the answer to any of those is no, the vision still needs refinement. Donors won't believe what they can't visualize.

As you are considering your vision, it's crucial that you think just like a storyteller. Describe the world you're building, not just the problem you're solving. Instead of saying, "We're addressing food insecurity," say, "We are creating a community where every family can sit down to a table with dignity."



That's vision language. Another key element of leadership vision is proportionality. When I meet executives preparing for major solicitations, I often ask: "Is your vision sized to your donors, or to your comfort zone?" More often than not, it's the latter. Leaders hesitate to dream out loud, because they fear looking unrealistic. But donors don't expect perfection. They expect purpose.

A big, credible, well-reasoned vision inspires confidence, even when it stretches comfort. People of Means want to solve big problems. If your description of the future feels too modest, you unintentionally limit what they imagine giving. When you create a great big vision that solves a big problem, only then can you expect big gifts.

So here's a practical framework for communicating vision effectively.

1. Anchor and purpose. Begin with why the work exists, and connect it to human outcomes.
2. Describe the future. Paint a specific picture of what success looks like. Use sensory language.
3. Show the path. Outline how gifts translate into measurable action.
4. Name the impact. Quantify results without losing your emotional thread.
5. And lastly, invite partnership, and with a direct invitation to join that future.

Every successful Major Gift conversation follows this pattern, whether it's spoken instinctively or planned intentionally. And here's something else: Vision is renewable. Every conversation you have is a chance to recharge it, for yourself and for others. The more often you articulate your future out loud, the more real it becomes.

As we move into the next segment. We'll take this concept further and talk about what it looks like to carry that same sense of vision and confidence when your staff or resources are limited. Whether you have an army of development officers or none at all, the CEO always has the potential to be the most effective fundraiser at any organization.

And if you happen to be in the audience today, and you're a chief development officer like me, don't worry, these principles apply to you as well. The first and most important principle of major gift work is that leadership presence changes everything. Every donor you'll ever meet is looking for evidence that your organization is stable, competent, and visionary.

They may read your materials, or attend an event, but what truly shapes their trust is interaction with you: the person at the top. When a CEO steps into a fundraising role with confidence and humility, something shifts in the relationship. Donors are not just hearing about the mission anymore. They're seeing it embodied. The person who carries the authority to make promises, and the responsibility to keep them is sitting across the table. That's when conversations move from curiosity to commitment.



Leadership presence matters, because major gifts are fundamentally relational. Donors just don't fund a cause. They fund capacity. They give because they believe the people leading the work can deliver on the promise. When they meet a CEO who speaks clearly about where the organization is going and how it will get there, the perceived risk of giving drops dramatically.

Here's the practical reality: Donors want to give to people who act like stewards, not like salespeople. And a CEO, when fully engaged. He or she carries an aura of stewardship. They can talk about the organization's priorities, its fiscal discipline, and its future direction in a way that no one else can. That sense of ownership builds trust.

Now, leaders often assume that a larger staff automatically produces larger gifts. And that assumption sounds reasonable. But it misses the central truth of major gift work. Transformational giving flows from vision that is clearly articulated and consistently carried to the right people. Staff capacity helps, but it doesn't replace leadership presence, disciplined habits, or the courage to ask. So if you're a lone CEO,

How do you structure major gift activities when resources are thin? And keep it effective when resources start to grow. Well...what you want to do is to begin with the principle you can control most directly. The leader sets the cadence. Major gift work is not an occasional sprint. It's a marathon. It's a weekly rhythm. If you lead a team or serve as a solo executive, you want to adopt a rhythm that fits inside your calendar, and guard it like you guard a payroll.

You do not need an intricate plan to begin. You need a simple pattern repeated without fail. A workable pattern looks like this: You want a weekly focused review. And this fits whether you've got a fundraising team with you or not. On Monday morning, you should identify 3 priorities for the week. One, relationship to advance. One, new conversation to initiate, and one stewardship action to complete.

Number two, you want to have two substantive conversations. Schedule 3 meetings every week. One with a current partner, one with a prospective partner, and one with a donor to thank and share impact. If schedules don't align, use a phone call or a video meeting, and treat it with the same level of seriousness that you would a face-to-face meeting. Follow up within 48 hours. Send a concise thank you, and a clear next step. Name what you've heard, restate the opportunity, and if appropriate, mention what both of you will do next. And then on Friday, it's time for accountability. Record outcomes and update your next steps. Then reflect on how you progressed.

This rhythm creates more than activity. It builds momentum you can actually feel. Over a year, two or three quality conversations per week yield more than 150 touchpoints that matter. That number is enough to sustain a credible major gift pipeline in small and mid-sized organizations, to keep the rhythm focused, work from a short living list. Identify a list of relationships you will actively cultivate and evaluate over the next quarter. You want it to be small enough to manage, but large enough to matter.

Your list should include current partners who could deepen their involvement, and prospective partners who share your values. Also include some current donors who would really appreciate an expression of gratitude from the CEO. Revise the list monthly. Move names off only when you have closed a clear loop, and add new names only when you have the capacity to pursue them well.

Little bit more reflection time: I'd like you to write down 3 names. One existing relationship, one new relationship to initiate. And a current donor to thank in the next week.

Leaders sometimes assume they must delay donor meetings until their materials are perfect. That assumption stalls progress. Brochures do not close major gifts. People and conversations about vision do. Prepared conversation beats polished collateral every time. Instead of hiring a graphic designer, go draft yourself a one-page brief to memorize until you can speak from it without notes.

Here's what you want to include: One sentence that names the human outcome. Three sentences that describe the future you are building. One sentence that connects vision to a first milestone. One sentence that states the funding required for that milestone and that time horizon. And one sentence that invites partnership. That is enough to carry a serious meeting.

You can refine the document after you learn what your partners care most about. Your language will improve faster in these types of conversations than it does by yourself in a room, just noodling away with paper. The most practical barrier you will face isn't your capacity or your lack of marketing materials. It's avoidance.

Leaders put off donor conversations for many reasons. Fear of being turned down, uncertainty about the right amount, concern about sounding presumptuous. The way through is having preparation that centers purpose and a script that carries you to a direct invitation without strain. Now, here's some simple wording that you can adapt immediately.

So for your opening, you could say something like, thank you for making time. I want to share where we're headed and hear your perspective, both on our goals and how you may or may not want to be involved,

Your vision. We're building insert-specific future state. It will change who or what by how. Your path.

Our first milestone is milestone over timeframe. The budget is your amount, and we will attract... we will track 2 or 3 measures, metrics.

Your invitation. We're inviting a small circle of donors to make this phase possible. Are you someone we should be thinking of for such an opportunity? This is the most important part right here, besides your vision.

Silence.

Pause.

Take a drink.

Of your drink.

Wait on the person to respond. Answer the response appropriately. Then follow through. Thank you.

I will send a brief summary of what we discussed, and I'll draft an outline of how your gift could be mobilized. This sequence keeps you from wandering and keeps the donor from guessing. It communicates respect and seriousness without pressure.

Finally, To be sure to match the scale of your vision to the capacity of your audience. Leaders sometimes under-ask because they fear offending the donor. The result is a misalignment that confuses both parties. A credible, larger vision, framed within a clear plan, often reads as more respectful than a tentative, smaller one. At the very least, it's more interesting. The key is proportionality and clarity. State the scale of the work and the role you're inviting the person to play. Then carefully listen to their response.

Fundraising, at any scale, is the same set of disciplines applied with patience. Vision that is large enough to matter, language that is specific enough to feel real. A weekly rhythm that is consistent enough to compound. When your organization grows, these disciplines expand with you. When your organization is lean, they keep you from drifting.

In the end, transformational giving is not a function of how many staff members carry business cards. It's a function of how consistently the leader carries the story. When you carry it with steadiness, partners appear. When you carry it with clarity, partners commit. When you carry it with gratitude, That's when partners stay. As you continue in this pattern, you will begin to see fundraising growth.

Now this pattern will help you grow, but beyond that, if there's a single factor that separates organizations that grow steadily from those that stay stuck, it's structure—not rigid bureaucracy—but structures of thought. Habits of Reflection. Systems for accountability. And a rhythm of learning that keeps vision focused.

In an organization that lacks a large fundraising team, coaching, or even peer mentoring, can be the tool that provides this type of structure. It transforms good intention, Into consistent execution. In major gift fundraising, Leaders often don't fail for a lack of intelligence or passion. They fail because they drift. Their calendars fill with meetings. They're message fragments, and their confidence erodes under the weight of daily complexity.

Strategic coaching interrupts that drift. It helps leaders slow down, think clearly, and realign every action with their vision. One of the reasons I started my coaching consultancy was that I realized most fundraising professionals aren't surrounded by teams of fundraising veterans who can encourage them and play the roles of coach and mentor in a very organic fashion.

I think about that first Chief Development Officer I mentioned to you. He knew what I needed. He knew what I needed to do with Dr. Smith, because he had been there. He had lived that, he had experienced that. And so he could guide me into the next step that helped me get over my fears. But in reality, most fundraising professionals aren't even managed by individuals who have experience Or training and fundraising.

Having worked at a large flagship university, I benefited immensely from the hundreds of development professionals who surrounded me. I was mentored by experienced fundraisers and taught industry-wide best practices in development and development operations. When I realized what a gift all that received wisdom and knowledge was, and that most fundraisers at most nonprofits don't get that opportunity, I decided to start a consultancy where I could provide my clients with individualized, strategic fundraising coaching, and to pass that understanding along to others.

That's why I'm here today. If today you find yourself at a small nonprofit in need of coaching, I'd encourage you to please contact me. I'd be glad to work with you. But if you don't have the budget for that. Here's what I want to suggest that you do: Find some experienced fundraisers. Network with them. Buy them coffee. Whatever it takes. Find yourself a mentor. That can help you.

In this final portion of today's presentation. I'm going to explain why having a coach or a mentor is important, and how you can get started. The most immediate value Of individualized strategic coaching is perspective. It's hard to see your own patterns while you're in them. A skilled coach functions as a mirror, reflecting what you're actually doing versus what you intend to do. Sometimes the insight is practical: Meetings that aren't advancing relationships. Language that accidentally undersells impact. Follow-ups that drift too long.

Other times, it's psychological. Fear of rejection disguised as waiting for the right moment. This kind of perspective isn't about criticism. It's about awareness. When you see what's really happening, change stops feeling theoretical.

The next benefit is alignment. Personalized coaching ensures your time, message, and goals all point in the same direction. When those three elements drift apart, Confidence falters. When they converge, Momentum builds naturally. A coach helps you make that convergence explicit. Defining the few actions that generate the greatest impact, then reinforcing them until they become habit.

Now, let's connect this to confidence and results. Coaching and mentoring. Build confidence, because they can help eliminate ambiguity. Most anxiety in fundraising doesn't come from rejection. It comes from uncertainty. Not knowing what to do next.

Coaching replaces that uncertainty with structure. When a leader can look at their week and say, I know which relationships matter most. I know what I'm asking for, and I know how to measure progress. The emotional load of your work drops. That steadiness translates directly into how donors experience you. They feel your composure, and they trust your follow-through.

Another function of mentoring, peer mentoring, and coaching support is cadence. Leaders often know what to do, but often not how to do it. They might meet donors sporadically. Follow up inconsistently and feel perpetually behind. Individual coaching builds realistic rhythms that fit into a leader's existing workload. Not to add more pressure, but to create predictability. Such input also keeps fundraising emotionally sustainable. It protects leaders from isolation.

As you all know, leading a mission is lonely work. You carry responsibility for vision, staff morale, donor trust, and financial results, all at once. Structured, individualized coaching can provide a place to think aloud. Examine complex situation, and regain composure before fatigue sets in.

Many nonprofit executives, especially those in small organizations, carry their fundraising responsibilities alone. They don't have peers, as we've covered. That truly understand the pressure of leading both the mission and the money. Structured relationships create space to process that pressure without judgment. It turns what was once a private stress into a shared learning process.

That stability radiates forward. Donors notice when a team leader communicates from steadiness, rather than strain. And teams notice it, too. A calm leader signals reliability, which in turn strengthens credibility. Good relationships like this should create accountability without judgment. True coaching, true mentoring doesn't scold. It observes, questions, and redirects. It asks, what's getting in the way? Instead of, why aren't you doing more?

That shift invites honesty. Once the barrier is visible, time, uncertainty, fear, distraction can all be addressed. That kind of accountability converts insight into momentum. Reflection without follow-up fades, but follow-up without reflection burns people out. Coaching weaves them together in a rhythm that lasts.

So... Here's a practical way to bring coaching structure into your own environment, even if you don't have access to a formal program or coach like me. Start a peer mentoring relationship with another leader. Once a month, meet for an hour, and ask each other 7 questions.

1. What donor conversations have I had since our last meeting?
2. What did I learn from them?
3. Where am I feeling stuck?
4. What's my next specific action?
5. Are my time, messaging, and goals all pointing in the same direction?
6. What language am I using with donors? Am I communicating need? Or am I communicating vision?
7. What am I intending to do, versus what am I actually doing?

This simple rhythm of accountability will improve your follow-through more than any manual ever could. Ultimately, coaching isn't creating dependency. It's about building mastery. The goal is to help leaders build internal muscle memory for the behaviors that lead to success, to reach the point where they can self-correct in real time.

That's when a leader can leave a donor meeting and instinctively think, what worked? What surprised me? What will I adjust next time? What are the right next steps for this donor? Those are the habits of confidence, self-aware leadership. Personalized coaching or peer mentoring can help you develop them faster and sustain them longer. Beyond coaching, Here are a few more things that you can do for little or no cost.

And many of you know this, but join AFP, join CASE, or AHP. Other organizations are out there, too, that are designed to help you support... designed to support and help encourage fundraisers. Find some great fundraising podcasts to listen to, like the Abundant Vision Fundraising Podcast. Read some good books on fundraising by experienced fundraisers. Some of my favorite are Gerald Panis, David Lively, or if you have a spiritual bent, Henry Nawen. Get into community with other fundraisers. Befriend colleagues. Find a mentor. So, let's end where we began: Vision. As fundraisers, we need to understand how our personal vision for fundraising.

As fundraisers, we need to understand how our personal vision for what fundraising is shaped by our personal history. We can reshape those broken visions, influenced by scarcity mentality. Or reinforce healthy understandings of money by rooting ourselves mentally in the mission of our organization, in embracing an abundance mentality.

When our vision is squarely focused on our mission. We're free to develop a transformational vision That attracts transformational generosity. CEOs that develop a clear, inspiring vision for their organization, will regularly share that vision with and regularly share that vision with donors, will increase giving if they ask directly.

Coaching and peer interaction can help you develop the discipline and messaging that are needed for persistent growth. Together, they create the conditions for major gift breakthroughs, repeatable. Lasting success, built on clarity and trust.

So let's just take a reflection moment here and ask ourselves: What are two steps you'll take this month to fundraise with greater confidence?

Maybe it's spend some time reflecting. Heck, maybe you need some counseling. Lord knows I did. Maybe you'll make a list of potential peers that you can build a mentoring group with. Maybe you'll hire a coach. Whatever it is, just take... take a couple minutes now.

So as you leave today, Remember this. Major gift fundraising isn't about pressure, it's about presence. It's about showing up with a vision, a structure, a gratitude, and a plan. Day after day. Conversation after conversation. These steady changes will change the way people see your organization. And in time, change what they believe is possible. Thank you for leading with courage, and thank you for being the kind of leaders who want to improve your leadership by investing the time it takes to come to a training like this.

I'm so grateful for your time and engagement today. I'd love to take a moment now to hear your reflections, and questions.

## Q&A Segment

### Thomas Wilson

Thank you, Tom. I've got a few questions here. I'm going to go over to the first one. You mentioned early in your presentation asking donors the right questions to be able to distinguish between whether or not they're interested in donating and how much. And do you have some examples you could share of, you know, some of these types of questions?

### Tom Dauber

Certainly, Thomas, that's a great question. You know, I'm a big fan of pre-soliciting. Before I do a major gift ask. I would love to have a separate meeting to inform the donor of what we're doing, cast some vision around our work, and then actually ask them for their blessing and permission, to have a gift conversation. You know, I think back to my days at the dental school. I think one of our favorite comments was, hey, we're not asking you for a gift today.

But we'd love to start a conversation with you to see if there might be something within our mission that aligns with your passions and can help you accomplish your philanthropic goals. Would you be willing to start that conversation with me?

Anything like that, it's always important in those types of questions, because they're going to be different for every donor and probably every nonprofit to always be very hypothetical. People aren't afraid of hypotheticals. People are afraid of distinct, clear questions that demand a decision right now.

So, you know, another question you could ask them is, you know, Thomas, are you the sort of person we should be thinking about for a gift like this? Or, Thomas, I know you care a lot about our organization because of your years volunteering with us. We often find that the people who give their time also really want to give their money if they can. Would you be open to exploring what that could look like? It's all gauging openness, and just asking for permission to explore before getting to the ask.

It's critical, and I learned this at an AFP conference at a course on negotiation, and it's so important that you never surprise your donors. They should always know what they're getting into when you meet with them. We never want to bait and switch them with anything.

### Thomas Wilson

Very good, thank you, Tom. Got a couple of questions here on the, you mentioned a one-page brief. And some particular sentences that should be included in the one-page brief. Do you have anything there that you could share on the, you know, to allow some of our participants to maybe take a couple of notes?



## Tom Dauber

Well, you know, you're talking about in terms of... oh, yeah, yeah, exactly. So, so that was, you know, the one sentence of purpose that names the human outcome, the three sentences that describe the future you're building.

The one sentence that connects vision to a first milestone. One sentence that states the funding required for that milestone and the time horizon. One sentence that invites partnership. And so I don't have a specific one that I give to people. It's going to be different for every organization, but if you just think about, you know, if... let's say you're trying to feed folks that don't have food in your community.

You know, your sentence of purpose, really, you should have that already, right? Because you should... every organization should have a vision statement and a mission statement. And so, it's taking that and crafting it around... putting it in narrative or sentence form, right?

And then, when we're thinking about the future that we want to build, again, it's not about funding the gap. It's not about, you know, I want to make sure that we have enough money to meet our goals this year. It's, you know, what would the world look like if there was no hunger?

And... and... and it's not just that. It's so crucial that we go further, down... down that list, like... Now, I'm not an expert on food insecurity, or its social impact, so for those of you in the crowd that are, please forgive me, but I'm betting that if we could end world hunger, we'd probably see grades in school go up. Right?

And so, if grades in school go up, well, what's that going to do for our communities? You know, is there going to be less poverty? Is there going to be less unemployment? You know, what's the big picture there? Are people going to parent better when they're not worrying whether or not their children can eat?

I'm sure they are. So, whatever those downstream implications are, we're talking about painting with color, include that stuff. Not necessarily as promises you can make, but just bold picture of what the future could make if you could really change those things. But it's crucial, though, that you not just talk about this idea.

You know, the one sentence that connects vision to a first milestone, and it could be 2 or 3 milestones, right? You have to show, especially business people that have some understanding of, like, you know, how do you execute a business plan? You have to show them you know what to do to get there. I can think of one situation where I inherited a campaign, and they had this bold dream for something that would do really incredible things, and no one was giving to it. And when I started to meet with our leaders who were in charge of that portion of the thing.

I discovered there was actually no plan at all as to how they would do it, or if they got the \$8 million they wanted, like, how would they even spend it? They didn't know.

That isn't the way to win credibility. And so you've got to actually spend some time, and hopefully you've got some people on your board, if not you personally, that knows a little bit about business planning. You don't have to do something that's so good that you could take it to a bank to get a loan, but just something like a one-pager or two-pager that really demonstrates to a donor that you've really thought through

How to get to this vision in a way that's believable. And then, of course, you want to be able to say, too, on this fourth point about the time horizon. You've got to know, like, when do you need the funding by? Like, it may cost you \$600,000 to reach this goal, but if you only need \$50,000 in that first year, be able to communicate that, because what you don't want to do is accept a \$600,000 gift from a donor. And then two years later, you still haven't spent all of it, and they're sitting around wondering what the impact is.

So, you want to clearly communicate all that up front. And then, that last sentence, it's the sort of thing we talked about, you know, earlier, in terms of, you know would you be open to partnering with us? Would you be willing to make an investment here? And there's two different things. Like, if this is a pre-solicitation conversation, one where you're not making the ask directly, maybe it's someone you don't know as well, it's inviting them into a conversation that may lead to a gift.

But if it's, like, your board chair, and you know they're on board, and they know you want to ask them for a gift, then it's, yeah, could you see yourself making a six-figure investment here? And then have some things, and make it a conversation, right? You want to have some thoughts in your head about.

Well, a six-figure gift could be \$999,000. It could be \$500,000. It could be \$100,000. Have some... have some backups in your mind. Go for the biggest one that you think is not reasonable. I always... I always recommend people soliciting gifts that are twice as big as they expect, because you just never know when that works out for you. And I've never had anyone get mad at me for asking them for a little bit too much. But you need to have that sentence at the end.

And if it is a direct ask, you need to be... you need to be direct. I think a real problem that... that some well-meaning fundraisers have is they just sort of... they're like, well, give this some consideration. You know, think about it, and whatever feels right to you, right? And... and that's... that's okay, but there's a lot of people out there that... that if you really tell them what you need and what you're hoping they'll give, you don't want it to be demanding. You don't want to say.

Thomas, I really need you and expect you to give half a million dollars. It would be... Thomas, we would... we would love it if you could consider giving us half a million dollars. Feels very different. One is demanding, one is expressing what we hope could be the case, and giving... but still giving them some idea about what that number is, and the type of impact that could make.

## Thomas Wilson

Thank you, that's very, very helpful there, Tom. I got another one here. or it's related to identifying potential major donors. Sure. So, you know, for a small nonprofit, do you have any tools or platforms that you could recommend, that could be utilized to identify potential major donors?

## Tom Dauber

Well, sure, there's platforms like DonorSearch and iWave that are super helpful. Certainly, there's some great consultants out there that have their own subscriptions to those things that could do that for you if you don't have the human resource to maybe manage all that. You know, and they're easy to find out there. I won't, you know, throw any specific links out right now in terms of individuals. I want to be fair to everybody. But yeah, there's definitely ways to do that. Just a general rule of thumb, and, you know, unfortunately, I don't have evidence-based research to back this up with, but I'm... I... 30 years of experience and talking to other people, we all seem to agree on this. You know, if you've got a thousand constituents.

Probably, you know, you can usually count 10%, but 100 of them are going to have major gift capacity, and you could probably count on 5% of those have an even greater, you know, maybe mega-donor ability. Now, that's going to vary from organization to organization. It's not always going to be true, but generally speaking, those people are out there. And, you know, if you were to go and, you know, get a screening, it might cost you \$5,000.

You know, to screen your constituents, but that would begin to give you some inkling of who are the people that have money. I mean, they're not 100% accurate, they miss a lot of things. But they can still be very helpful as you're searching for donors. And beyond that, though, the best thing is to start asking. Ask your board.

You know, you should all have boards that care about your organization, and hopefully you've got some people of means on your boards. They care about what you're doing, and just start networking. Find out who those people are that care about those things.

## Thomas Wilson

Really good, you mentioned, mentioned really utilizing your board. Here's a question for you. What's... what's one thing in your mind, that CEOs and boards often misunderstand about their role? In major gift fundraising.

## Tom Dauber

Hmm. Well, I think sometimes they underestimate how much their presence matters. I can think of one CEO, and we'll keep everybody anonymous here. Who, who hired a chief development officer, and this CEO is so charismatic, and so well-loved.

I can't think of a person that... of means that knows that person that would say no to him. But... but to my... to my knowledge, he's not been involved in any major gift solicitations. He's been leaving it to his chief development officer, because in his mind, he's thinking, oh of this is their job, and so he hasn't gone on any asks. Hasn't asked any... and I'm telling you, this guy's the real deal in terms of charisma and vision.

And not every CEO is that, but like I was saying earlier, they embody the mission, and they're the one that can say to a donor, this will happen, with credibility. I don't want to in any way downplay the importance of development officers like myself. Like, we can do that work with credibility,

But there's always a little bit of skepticism, I think, from donors, or there can be, because they look at us as, like, well, you're getting paid to be here and ask me this, right? It's not necessarily because you're sold out to the vision, or your life is committed, you know, to this work. And so, as much as we can do the job, for the big asks, I would always want to have the CEO in there, just because there, you know, there's just a presence there that can't be replaced by a development officer.

## Thomas Wilson

Got a comment here from one of our participants, very, very good, very good statement, very good thoughts here, but here's the comment. My thought is that really... I'm not really soliciting funds. Instead, I'm sharing my journey and asking the donors if they would like to come along and help us get to the vision.

The trick at my current organization is helping to lay the land for the bigger ask, as historically smaller donations were the big ask.

## Tom Dauber

Well, you know, I don't know your context, I don't know your organization, so it's hard for me to speak specifically. But my gut is, for the average nonprofit. what you're talking about, casting a vision, inviting people to partnership, that's certainly... you're going the right direction, but I would say you're stopping short. If... if someone says, yes. Yes, I love your vision, I want to be a part of this.

If you go one step further, and this takes some courage. it's... the next question is, well, what might that look like to you? What would you have in mind? And really get them to start talking about what they might want to give.

Furthermore, I would say you might even want to have some numbers in mind. My question to this person, if I were their coach, would be, well, how much does the whole vision cost? Like, is this a \$10 million vision? You know, if it is, I would be completely unashamed to say, hey, we've got a \$10 million vision that's going to result in this transformative vision for this community, or this set of people, or in this specific situation. We need people that can really step up and do six-figure, 7-figure gifts.

We need people that can do 5-figure, six-figure gifts, or even 4-figure gifts, whatever those numbers are, they scale, you know, for your organization. Could you see yourself. Making a significant, even sacrificial gift to help make this dream a reality and really try to get to a specific number. Because, you know, if you don't do that, the likelihood is that the person probably isn't going to give you as much as they might if you directly asked.

## Thomas Wilson

Okay. Very good. Maybe I have one final question here. So, you've helped a lot of leaders overcome fear in fundraising. What would you say is the most common barrier that you see. And how do you coach these leaders through that barrier?

## Tom Dauber

It's projection. You know, we all project our own assumptions and expectations about money. And philanthropy and generosity on everybody else. You know, that's why if you're talking to a person who is not inherently grateful—and there's actually been evidence-based research that shows like, 40-50% of people have an inherent leaning towards gratitude. A research institution out in California, I think at Berkeley did the research on that. And there's also other research that's not been connected to that, but it should be, that talks about gratitude being an indicator of giving, of propensity to give.

If you talk to someone who's not grateful, and who doesn't have a bent towards generosity and you ask them, who would give to something like this? They're almost always going to say, ugh, nobody's going to give to that. You need to go ask Jeff Bezos. You need to go ask the pharmaceutical company. You need to go ask Walmart. Because nobody wants to give like that.

And they're, you know, those people will project, right? Well, the problem is, is if you're at a university, or at a nonprofit, and you've got a leader who may be one of those people, or at the very least, may not have the experience, they're going to project their expectations. That dean that I was talking to you about, you know, generous guy, but was projecting his own stuff. Now, the follow-up to that story, actually, is Dean Number Two

He ended up having an opportunity, to, to... to document, like a... an 8-figure, planned gift. And, he decided that that would be too pushy, that that would be too private of a conversation to have, too personal. And so he said, well, I'm not going to do that. I'm not going to press that guy. Just so happens that that dean had his own planned gift to, to his alma mater.

And he wrote... and he actually made a point of telling me, I'm not telling them what I'm doing. I'm not going to tell them what the plan is, how much it is. I'll let them find that out after I'm gone. Well, a development officer working for him ended up talking with that individual with the 8-figure planned gift and ended up booking it. Despite what the dean told them. So...

So it's just... that's the thing. And what I'd recommend to all of you doing, whether you're... if you're a CEO, you need to take a long look at your heart and ask yourself, what am I projecting on other people? And if you're a development officer in this conversation right now, you need to, like, have a direct conversation with your CEO. Call out the elephants in the room. What assumptions are you bringing to fundraising? What attitudes about philanthropy is coloring the way you see our work? Direct conversation, thoughtful conversation like that, as long as people are open to it, can be really beneficial.

## Thomas Wilson

Thank you so much. That was very good information, all about building that network and leveraging your network. Utilizing your board, So, so important.

## Tom Dauber

Thanks, Thomas.

Well, if there aren't any other questions, is this where we close things up, Thomas? Great. Well, I want to thank everyone again for coming out today. It's been a real privilege to be able to speak with you and share with you from my personal experiences.

Take care, and God bless.

## Thomas Wilson

Thank you so much.