

Unlocking Insights from Elite Donors

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Elite donors are crucial for many non-profits, but an overreliance on indirect indicators of their motivations, experiences, and perspectives limits organizations' understanding of this key constituency.

This study presents strategies to overcome the challenges in gaining access and engaging in direct, substantive dialogue with elite donors.

Practitioners can secure invaluable insights into elite donors' views and actions by creating credibility with philanthropists to open the door; thoughtfully building rapport through shared interests, a comfortable experience, and the opportunity to review discussions; and drawing on donors' interest in advancing their views, feeling heard, and leveraging their impact.

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Background & Context



- **Wealthy elites have a higher propensity to give and make larger charitable gifts than the general population. A nuanced understanding of their thinking is essential to activating philanthropic potential;** however, studies to date have relied on mediated data drawn from surveys, secondary analysis, and interviews with advisors/proxies.
- **To address the lack of primary data,** the author proposes greater use of interviews: conversations for the purpose of outlining elite donors' thinking on philanthropy in general and their particular views. **The study presents results from 46 donor interviews.**
- The **interview approach has several challenges.** The three elements identified here are gaining access, establishing rapport, and making sense of findings from a given individual without "distortion" of the findings in light of the striking surface differences between elite donors and others.
- The article addresses each of the three challenges in turn. While the focus here is on securing data for research purposes, each point also includes **practical tips of relevance for practitioners, from warm-up questions to establishing a framework to keep the conversation on the topic.**
- Researchers would likely also need to perform similar interviews with non-elite donors, but that aspect is less significant for practitioners.

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Take aways & Learnings



- **Success factors in recruiting interviewees (access):** securing interview meetings depended on a combination of interviewer credentials, interactions with people known and trusted by the interviewee (as a reference check), flexibility on time and location of meeting, and the opportunity to review results from the study.
- **Success factors in building rapport and trust:** the most effective interviews resulted from organic connections to the interviewee (eg, having met at a philanthropy conference), looking the part (dress and presentation of self), identifying similarities (eg, shared hometown), and playing up the broader impact of the conversation for philanthropy.
- **Success factors in “dealing with the dazzle”:** heightened awareness of both elite donors’ connections to broader themes (role of personal taste, influence of networks, life events) and substantive connections to broader themes (eg, desire to give to efficient organizations is not just a function of high net worth) are key to avoiding overreliance on the apparent quirks a given person may display.
- **Practical steps to “create luck”:** *thoughtful and thorough preparation* will be rewarded in seeking connections to elite donors, as shown by the author over many years. The tips above, and others in the article, will set the stage for creating more “luck” for practitioners and the organizations they support.

The path to substantive dialogue with elite donors



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