MAKING FRIENDS & TELLING STORIES

THE ART & SCIENCE OF MAJOR GIFTS



RON J. HUDDLESTON, CFRE, FAHP

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A PREVIEW OF THE FORTHCOMING BOOK

Planned Publication: 2027

An introduction to the author's approach to major gift fundraising, with selected passages from the forthcoming 18-chapter book.

THIS WEBSITE EDITION INCLUDES

Dedication · Foreword by Alan G. Sherwood · Preface

Selections from Chapter 1: Introduction: What Makes Major Gifts Possible

Selections from Chapter 4: Crafting a Compelling Case for Support

Selections from Chapter 6: Prospect Research and Donor Identification

Complete chapter list · About the Author

This free preview contains excerpts, not the complete chapters. The author's original manuscript wording is preserved in the selections. The full book is planned for publication in 2027.

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Dedication

To my grandmothers, Mimi and Mom

When my brother Jim and I needed them most, our grandmothers were there. They made certain we were cared for, that we had food on the table, clothes on our backs, and, most importantly, that we always knew we were loved.

But they gave us something even greater. They taught us that no matter how difficult life becomes, we should never lose faith in God or in ourselves. Through their kindness, sacrifices, encouragement, and unconditional love, they gave us the strength to believe we could overcome life's hardships and build a better future.

Looking back, I realize just how much of who I am today began with the love and guidance of these two remarkable women.

Mimi and Mom, your love made a difference that has lasted a lifetime. I will always be grateful.

God bless you both!

Foreword

By Alan G. Sherwood, MBA, CFRE, President Sherwood Consulting Service Inc.

Ron Huddleston is no ordinary fundraising professional! As professional colleagues, Ron and I have known and worked with each other for more than three decades. He has always been a successful visionary who grasped the profound essence of philanthropy. Over the years, our countless conversations have ranged from the gritty challenges of major gift fundraising to its most triumphant moments, often swapping stories and insights about what ignites donor passion and what falls flat. What has always distinguished Ron is his rare gift for turning intricate and/or audacious ideas into clear, actionable and successful strategies that resonate with anyone eager to make a significant difference in the lives of those they serve.

That gift shines brilliantly in *Making Friends & Telling Stories: The Art & Science of Major Gifts*. This book is a masterwork, brimming with wisdom for nonprofit leaders navigating the dynamic world of major gifts. Ron has poured his heart and a lifetime of experience into these pages, weaving a tapestry of lessons that transcend the mechanics of fundraising to celebrate its relational and transformative power. It's not just an A to Z guide for fund development — it's an invitation to see philanthropy as a partnership, where every donor becomes a vital part of a shared mission.

What sets this book apart is its unwavering focus on real-world application. Ron recognizes that no two nonprofits are identical, and his strategies are as adaptable as they are inspiring. Whether you lead a small grassroots organization or helm a seasoned institution, you'll find tools here tailored to your unique journey— strategies for crafting a compelling Case for Support that sings, building a sustainable major gifts program

that thrives, and galvanizing boards and volunteers into passionate advocates. But beyond the practical, Ron's voice offers something deeply encouraging: a reminder that fundraising isn't merely about securing resources; it's about forging connections that spark generosity and leave a lasting imprint.

Having spent decades in major gift fundraising and consulting myself, I know the trepidation that can accompany that first bold ask or the challenge of breathing new life into a faltering program. Yet, as you turn these pages, you'll feel Ron's steady hand guiding you, transforming obstacles into opportunities and urging you to dream bigger. This book will help you and your organization create better efficiencies on the inside, and more effectiveness, in terms of impacted lives, on the outside.

Ron's passion for philanthropy and his unrelenting dedication to empowering nonprofit leaders radiate through every chapter. It's an honor to call him both a colleague and a friend, and I'm certain this book will become an indispensable companion for you, as it has for me. His successful strategies will help facilitate getting more gifts and larger gifts from more donors, and at a lower cost per dollar than you have ever experienced before.

Take this journey with Ron—adapt his roadmap to your mission—and witness the extraordinary transformation that unfolds when you fuel your organization with the power of authentic relationships and heartfelt storytelling. This isn't just a book about fundraising; it's a call to leadership that will change not only your nonprofit but you as a leader.

Alan G. Sherwood, MBA, CFRE

President Sherwood Consulting Service Inc.

Preface

Long before I held a professional fundraising position, I learned something about generosity while attending the University of California, Irvine. I founded Community Concern, a student volunteer organization that connected students with opportunities to help others through hospitals, social service agencies, and community projects. What impressed me most was how willing people were to give their time and talents when someone took the initiative to invite them and show them where they could make a difference.

That experience taught me something I have carried throughout my career: people often want to help, but sometimes they need someone to bring them together with a cause worth supporting. As I moved into professional fundraising in the 1970s, I began to understand that the same principle applied to philanthropy. Over the years, donors, Board members, CEOs, volunteers, and development professionals have taught me a great deal about what inspires generosity, what makes people hesitate, and what causes organizations to lose the confidence of people who once wanted to help.

I have heard too many donors wonder why they hear from an organization only when another gift is needed. The donor may have received a tax receipt, an annual report, and several appeals, but no personal call to say thank you or explain what the last gift accomplished. That is not stewardship. It is a missed opportunity to build a relationship.

I have also heard Board members, CEOs, and volunteers tell me they could never ask someone for money. My response is that asking is often the easiest part. The request may represent only 5% of a successful major gift solicitation. The other 95% is strategy: finding the right solicitor to ask the right prospect for the right amount, for the right project, at the right time. We are not standing on a corner with a tin cup. We are

inviting someone to consider an investment in a project that can change, improve, or even save lives. That is a very different conversation.

I wrote Making Friends & Telling Stories because I wanted to share more than the familiar advice to 'build relationships.' Of course relationships matter. But what should a development officer actually do on Monday morning? How do you identify the right people, earn an appointment, discover what interests them, and know when the time is right to ask? How do you develop a Case for Support that makes someone say, 'I didn't know you did that. How can I help?' And after the gift arrives, what responsibilities do we have to the person who made it?

These pages address those questions and the work that must take place inside an organization. A Board, CEO, and development officer each have responsibilities that cannot simply be handed to someone else. Hiring the right people matters. So does conducting an objective Campaign Planning Study that tests what is possible rather than justifying a goal already chosen. Whether the task involves major gifts, a capital campaign, or planned giving, success requires sound judgment, thoughtful strategy, and consistent follow-through.

I've tried to make this a practical book. You'll find specific guidance on donor conversations, solicitation decisions, campaign leadership, stewardship, and the mistakes that can undermine good work. The stories and situations come from the many kinds of organizations I've encountered over my career. No two organizations are alike, and no donor relationship follows a script. My hope is that you will take the lessons that apply to your work and put them to use.

Technology has changed enormously since I began, and it will continue to change. We have remarkable tools for research, communication, and managing information. I welcome them when they help us do our jobs better. But they cannot replace a personal visit, careful listening, a direct

and respectful request, or a promise kept. The most important work still takes place between people.

If this book helps you ask better questions, develop better strategies, make more meaningful visits, and take better care of the people who support your mission, it will have accomplished what I hoped. Raising more money matters because of what those gifts make possible for people and communities. That is what makes this work worth doing.

Ron J. Huddleston, CFRE, FAHP

SELECTED PASSAGES FROM CHAPTER 1

Chapter 1: Introduction: What Makes Major Gifts Possible

After decades of working with nonprofit organizations, I have come to believe that major gift fundraising is both simpler and more demanding than we sometimes make it. The basic principles are not complicated. Get to know people. Understand what matters to them. Explain what the organization hopes to accomplish. Invite them to help, and honor the trust they place in you.

Putting those principles into practice takes patience, preparation, and judgment. A prospective donor can care deeply about an organization and still be uncertain about making a substantial commitment. A Board can believe strongly in its mission yet hesitate to help open doors. A CEO can be an effective organizational leader but leave nearly every donor conversation to the development office. Success depends on how well these people understand their respective responsibilities and work together.

This is why I have always described major gift fundraising as both an art and a science. The art is found in listening, building relationships, understanding people, and knowing when to ask. The science includes research, sound planning, a credible Case for Support, careful recordkeeping, and a disciplined process for following through. We need both. Neither a warm relationship nor a well-organized fundraising plan is enough by itself.

Philanthropy continues to change. Donors have more ways to learn about organizations, more causes competing for their attention, and more information with which to judge results. Technology gives development professionals tools that earlier generations could scarcely have imagined.

Yet the fundamental reasons people make significant gifts remain remarkably personal. That is where this book begins.

The Human Side of a Major Gift

A major gift is rarely explained by financial capacity alone. A person may have considerable wealth and little interest in a particular organization. Someone with more modest resources may make an extraordinary commitment because the mission has touched their life or reflects something they value deeply. Knowing what a person can give is useful. Understanding why that person might want to give is far more important.

Donors bring their own experiences, hopes, family considerations, and convictions to a philanthropic decision. Some give in gratitude for care they or a loved one received. Others want to create opportunities they did not have growing up, strengthen a community, honor someone important to them, or leave something of lasting value. Recognition matters to some and not at all to others. Motivations can overlap, and they can change over time.

We learn these things through genuine conversations, not through a questionnaire disguised as a visit. We ask thoughtful questions, listen to the answers, and pay attention to what a donor wants to accomplish. We also have to accept that an individual may admire our work and choose to direct their philanthropy elsewhere. Respecting that decision is part of building trust.

This is what I mean by making friends. It is not a technique for manufacturing friendships so that we can ask for money. It is a commitment to treating people with interest, honesty, and respect. It means remembering what matters to them and being willing to maintain the relationship whether or not a gift follows.

Telling stories is equally important, but good storytelling is not exaggeration. It is the ability to help someone understand a real need, see the people affected by it, and recognize what thoughtful philanthropy could make possible. Facts establish credibility. A well-told, truthful story helps those facts matter. Donors should be moved by the work itself, not by a polished presentation that promises more than the organization can deliver.

End of selected excerpt. The complete chapter will appear in the full book, planned for 2027.

SELECTED PASSAGES FROM CHAPTER 4

Chapter 4: Crafting a Compelling Case for Support

Years ago, I wrote an article called "Missing the Case." The title was meant to be a little amusing, but the problem was serious. Organizations were producing handsome case statements filled with photographs, impressive accomplishments, and glowing descriptions of their programs. Yet when you finished reading, you still did not know why someone ought to make a gift. The document was there. The case was missing.

I have seen that problem throughout my career. A Board approves a project, the staff gathers a long list of accomplishments, and a designer makes it all look wonderful. Then a donor asks, "Why is this needed, and what difference will it make?" If the answer is vague, attractive printing will not help.

A Case for Support should explain why the organization matters, what it intends to accomplish, why additional resources are needed, and why someone should want to participate. It should give Board members confidence, development officers a sound argument, and donors enough information to make an informed decision. A good case does not guarantee a gift. It makes a serious conversation possible.

The Case Must Actually Make a Case

I consider the Case for Support the cornerstone of a development program. It is more than a brochure, slogan, or request for money. It is the argument for the institution's work and the opportunity being presented. Appeals, grant proposals, campaign brochures, and individual gift proposals may draw from it, but none should substitute for it.

Harold J. (Sy) Seymour described the case as "an orderly compilation of those arguments" intended to encourage generous action. That word arguments matters. A case must persuade, not simply describe an institution.

I remember a CEO once asking me what I wanted the Case for Support to accomplish. I smiled and answered rather firmly, "When someone finishes reading it, I want them to wipe a tear from their eye, say, 'I had no idea your organization did all that,' and then ask, 'How can I help?'" Sometimes I take it a step further and say, "How much money do you want?" I was not suggesting that we manufacture emotion or exaggerate accomplishments. I wanted the reader to understand the human importance of the organization's work, discover something meaningful they had not previously known, and feel moved to become involved. That is what a compelling Case for Support should accomplish. If it does not touch the heart, inform the mind, and inspire action, we have not finished making our case.

End of selected excerpt. The complete chapter will appear in the full book, planned for 2027.

SELECTED PASSAGES FROM CHAPTER 6

Chapter 6: Prospect Research and Donor Identification

I have seen organizations spend considerable money identifying people who have money, only to discover that they have little interest in the organization. I have also seen a person who made a modest gift year after year become one of an institution's most important supporters. The difference is not always wealth. More often, it is what we know about the person and whether we have taken the time to develop a relationship.

Prospect research helps answer three questions: Who might care about our work? Who may have the ability to make a meaningful commitment? And how might we begin a conversation that allows us to understand the person's interests? Research gives us clues. It cannot tell us precisely why someone gives, what concerns them, or what they might want their philanthropy to accomplish. We learn those things from people.

A university may employ a professional research staff and purchase sophisticated screening services. A small animal shelter may have one development employee, a few committed volunteers, and a spreadsheet. Both can conduct valuable prospect research. The tools are different, but the purpose should be the same: to make our time with donors more thoughtful and productive.

Start with People, Not Wealth Ratings

A wealthy individual is not automatically a prospective donor. Nor should we overlook someone who lacks an impressive public profile but has a longstanding commitment to a cause. Wealth screening can suggest financial capacity. It cannot establish inclination, determine how much is available to give, or replace an actual conversation.

I want to know what a person cares about, how that individual became connected to the organization, whether similar causes have received support, and who might make an appropriate introduction. I also want to understand whether our organization has done anything to earn this person's confidence. A donor may admire the mission but have other philanthropic priorities. That should be respected, not treated as a failure of the screening process.

The story in Chapter 3 about the woman who gave one organization $500,000 annually and another $5,000 is a reminder that a giving category can conceal more than it reveals. Her $5,000 gift was not evidence that she could give no more. It was the amount the development director had asked her to consider. Research should help us avoid assumptions; it should never become an excuse to make new ones.

End of selected excerpt. The complete chapter will appear in the full book, planned for 2027.

The Complete Book

The full edition will include 18 chapters. This preview contains selected passages from Chapters 1, 4 and 6; the remaining chapters are not reproduced here.

Chapter 1: Introduction: What Makes Major Gifts Possible

Chapter 2: Engaging Leadership, Boards, and Volunteers

Chapter 3: The Foundation of Fundraising: Annual Giving and Its Relationship to Major Gifts

Chapter 4: Crafting a Compelling Case for Support

Chapter 5: Building the Major Gifts Office

Chapter 6: Prospect Research and Donor Identification

Chapter 7: Scaling Your Development Office: A Roadmap for Small Shops

Chapter 8: Relationship Building: The Heart of Major Gifts

Chapter 9: Donor Psychology and Behavior Insights

Chapter 10: Preparing for and Making the Ask

Chapter 11: Stewardship—Retaining and Growing Major Donors

Chapter 12: Planning and Executing Capital Campaigns

Chapter 13: The Vital Role of Planned Giving in Major Gift Fundraising

Chapter 14: The Fundraising Ecosystem: Integrating Annual Giving, Major and Planned Gifts, and Capital Campaigns

Chapter 15: Leveraging Technology and Metrics for Fundraising Success

Chapter 16: Preparing for the Unexpected: Protecting Your Fundraising Program

Chapter 17: Hiring the Executive Who Can Actually Lead Philanthropy

Chapter 18: The Future of Fundraising: What Will Never Change

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About the Author

Long before fundraising became his profession, Ron J. Huddleston was finding ways to bring together people who wanted to help and people who needed help.

His journey began while serving in student government at Cypress College in Southern California. A fellow student had recently returned from England, where he had been involved with Toc H, an international service organization with Christian roots. Inspired by what he heard, Ron helped with that fellow student to secure a grant from Toc H to support community service efforts in Southern California.

When he transferred to the University of California, Irvine, Ron organized a student volunteer program called Community Concern. The concept was simple: match students with volunteer opportunities where they could use their interests, education, and developing skills to make a difference. Premedical students volunteered in hospitals, business students gained experience with companies, and social science students worked with nonprofit organizations and county social service agencies.

But Ron also wanted students who had only a weekend to spare to have an opportunity to contribute. They built vegetable gardens for halfway houses, constructed wheelchair ramps for people with disabilities, and traveled to Tijuana, Mexico, to help build an orphanage.

One experience has remained particularly meaningful to him. Hoping to organize a Halloween outing for 20 residents of Fairview State Hospital, Ron posted a flyer asking UCI students to volunteer. Nearly 100 students showed up in costume to take those individuals Trick or Treating in a local neighborhood, quite the site to see.

For Ron, it was an unforgettable reminder of something he would carry throughout his career: people are often willing to help when someone takes the time to invite them.

His commitment to service also took him to England, where he spent a summer organizing activities for children whose families could not afford vacations, sponsored by TOC H. His early volunteer leadership earned recognition from UCI, its School of Social Ecology, and the Orange County Council of Women in Chambers of Commerce. He also served on an early board of the Volunteer Center of Orange County.

There was another important chapter to Ron's university experience. Recognizing the contributions Community Concern was making to the university and the surrounding community, the Chancellor of UC Irvine hired him as a student advisor. Beyond the honor of the appointment, the modest income from that position allowed Ron to attend college full time without taking an outside job. He paid his own way through college, eventually becoming the first in his family to earn two college degrees.

That accomplishment held a special meaning for someone whose early life had been anything but easy. As a freshman in high school, following a fight, a school counselor warned Ron that unless he changed his ways, he would likely end up in prison or dead before reaching his twenties. Those were difficult words for a young man who needed encouragement. Fortunately, that prediction did not define his future. Through perseverance, faith, the support of people who believed in him, and a growing desire to make something of his life, Ron discovered opportunities that would eventually lead to a career devoted to helping others.

Those experiences eventually led him into professional fundraising. At the University of California, Irvine Medical Center, he helped organize Swing for Kids, an ambitious month-long golf fundraising program involving nearly 30 golf courses, culminating in a Tournament of Champions and banquet. The proceeds supported the hospital's pediatric services.

What began as a commitment to volunteerism was becoming a lifelong profession.

Ron went on to hold senior fundraising and executive leadership positions, including Senior Vice President of the Pacific Hospital Foundation, President and Chief Executive Officer of the French Hospital Foundation, and Senior Executive Vice President of HonorHealth Foundation.

In 1989, he founded The Huddleston Group, a national fundraising consulting firm headquartered in Scottsdale, Arizona. Over the years, the firm's principals and associates have provided counsel to more than 1,000 nonprofit organizations, supporting philanthropic efforts that have raised more than $1 billion worldwide.

His work has taken him from small grassroots organizations to major healthcare systems, colleges and universities, community foundations, and national and international nonprofits. Along the way, he has advised boards, guided campaigns, helped organizations strengthen their fundraising programs, and taught development professionals and nonprofit leaders throughout the United States and Europe.

Ron holds an Associate of Arts degree in Philosophy from Cypress College and a bachelor's degree in social Ecology from the University of California, Irvine. He also completed executive education at the University of Wisconsin's Graduate School of Business. He is a Certified Fund-Raising Executive (CFRE) and a Fellow of the Association for Healthcare Philanthropy (FAHP). Yet, after more than four decades in philanthropy, Ron believes that successful fundraising still comes down to something remarkably simple: people give to people.

He has always found particular satisfaction in helping organizations whose leaders are willing to roll up their sleeves, make difficult decisions, and do their part to succeed. He believes major gifts are rarely the result of a clever presentation or a well-rehearsed request. They grow out of

relationships, trust, thoughtful strategy, and taking the time to help donors understand how their generosity can change, improve, or save lives.

That philosophy is at the heart of Making Friends & Telling Stories: The Art & Science of Major Gifts.

Ron wrote this book to share the lessons, experiences, successes, and occasional hard knocks of a career spent working with donors and nonprofit leaders. His hope is that readers will come away not only with a better understanding of how to raise money, but with a deeper appreciation for the people who make philanthropy possible.

Because, in the end, the most meaningful measure of success isn't simply how much money we raise. It's what that generosity makes possible in the lives of others.

Learn more at thehuddlestongroup.com

The complete edition of Making Friends & Telling Stories is planned for publication in 2027.

MAKING FRIENDS & TELLING STORIES

THE ART & SCIENCE OF MAJOR GIFTS

In *Making Friends & Telling Stories,* Ron J. Huddleston distills more than four decades of frontline experience into a practical and inspiring guide to major-gift fundraising. With clarity, candor, and real-world insight, he shows nonprofit leaders, board members, and development professionals how to build authentic donor relationships, tell compelling stories, ask with confidence, steward gifts with integrity, and lead campaigns that make a lasting difference.

Grounded in experience across healthcare, education, human services, arts and culture, faith-based work, and community nonprofits, this book is a roadmap for turning relationships into transformational support.



Ron J. Huddleston, CFRE, FAHP, is founder and president of The Huddleston Group and a veteran fundraising counsel with more than forty years of experience in major gifts, campaign planning, capital campaigns, and nonprofit leadership.

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