



## Toni

### **Donor Profile: New Philanthropist / Compassionate / Business Owner**

Toni opened her bakery Brot's Bread in 2007 just after finishing culinary school. The 2008 recession was a difficult challenge for her new business, but she managed to overcome through a business loan and through her friends and family driving new business to her bakery through word-of-mouth and social media. She opened a second location to manage her growing business in 2016, then had plans for a third Brot's Bread when the COVID pandemic hit.

Through the pandemic, she cancelled plans for the third location and was barely managing to keep her current staff safely working and paid. Other bills were left unpaid, and her partner noticed symptoms of depression and anxiety. Feeling overwhelmed, Toni reached out to her local NAMI in late 2020 and found the tools and support she needed for both her partner and her. Serendipitously, in one of her support groups, she also met a local sandwich shop owner who was having trouble with supply chains and keeping bread stocked for his restaurant. Toni began a business partnership with the local chef, delivering bread to his restaurant and much-needed revenue to her bakery.

Today, Brot's Bread is featured in several local restaurants in town, and her two bakeries are flourishing with daily walk-ins and specialty orders. She feels she would not be where she is today without the support she received from NAMI and now wants to give back. She is new to being a donor to any nonprofit and has asked for some guidance.

## Wally & Lynn

### **Donor Profile: Self-Made / Business-Savvy / Secret Philanthropist**

Wally and Lynn have built a life together. They feel quite fortunate to be where they are as neither grew up with very much. Through careful planning and budgeting, Wally and Lynn paid off their home well before their mortgage term and grew their savings to a comfortable sum. Wally borrowed against their investments to start his own business about 10 years ago, and the business is thriving. Lynn just retired from her office job, Wally is looking to sell part of his successful business, and they are both looking forward to a comfortable retirement together.



What had been modest donations to a few nonprofits 20 years ago have now become \$10,000-15,000 donations annually, though they prefer anonymity. While they care about creating social good, they also care greatly about making good financial decisions as those decisions led to their life today. To Lynn and Wally, a nonprofit making good financial decisions for itself is *almost* more important than the mission...almost. Their last few gifts to your organization have been around \$5,000 each year, though they have subtly hinted at the possibility of a larger gift. Your organization recently sent its monthly e-newsletter, and Lynn replied, asking for a time to meet with you when they return from vacation.

## Betsy

### Donor Profile: Loyal donor / Limited time & resources

Betsy is 55 years old and supports NAMI because her sister had depression and died by suicide in 2002. She has been a loyal supporter for the last 8 years after hearing about NAMI from a friend.

For the last 20 years, Betsy has worked as a receptionist for a local construction business, which keeps her remarkably busy and prevents her from volunteering as much as she would like.

Betsy gives \$10/month to your organization and makes an additional \$50 donation on Giving Tuesday every year. She responds to your advocacy alerts and posts regularly about your affiliate on her Facebook page. Betsy is a widow and has one daughter who is 27 and getting married this year. Her daughter also gives \$50/ year on Giving Tuesday in honor of her mom, but she is not personally engaged in your work.

Betsy does her best to attend all your events and volunteer when she can, and when you see her, she talks about how she wishes she had more time and disposable income to support you.

You are going to see Betsy this weekend since she is helping staff a table at your organization's next community fair.



## David

### **Donor Profile: Lived experience / Grateful participant / Active young person**

David is 24 and has participated 2 years in a row in your NAMIWalk. His first year, he raised \$250. The following year he raised \$600, exceeding his \$500 goal. David has recently shared that he is new to fundraising and that his experience asking people to support his NAMIWalks fundraiser has been fun and not as intimidating as he thought it would be. He really likes it when people open up to him about their experiences with mental health after he shares his connection to NAMI.

David supports NAMI because his brother has schizophrenia. He attended a support group with his mother two years ago when his brother was hospitalized for the first time after hearing about NAMI from a nurse at the hospital; this experience inspired him to sign up for your NAMIWalk. His brother is doing well now, and David wants to help others.

You learned at a recent NAMI event that David is an avid cyclist and posts actively on his social media accounts about his cycling adventures with his friends.

You are scheduled to talk with David to thank him for his Walk participation.

## Graham

### **Donor Profile: Former Staff / Retired / Active volunteer / Grateful participant**

Graham is 71 years old and spent the first half of his career as a research assistant and then psychology professor. He published several award-winning textbooks and publications in his field.

After leaving academia, Graham worked at NAMI for a decade before retiring at 68. He wanted to stay involved so he applied to volunteer where he now volunteers three times/week. His passion for NAMI was rooted in personal experience – his son has bipolar disorder and was hospitalized at 13 years old. Now an adult, his son is unable to work full-time, and Graham worries about what will happen to him when he passes. He has expressed interest in setting up a trust to support his son, but also would like to continue supporting NAMI, possibly through a planned gift. Between 2015-2018, Graham donated \$25/month to NAMI. He previously donated



\$1k to the Red Cross. He has also been involved as a member of the American Psychological Association (APA) for many years and is currently a member of a local German American Club.

Graham is divorced with two kids – one son and one daughter. His daughter lives in Denver and participates in her local NAMI. His son lives in local group housing. He has two chihuahuas. You see Graham almost weekly during his volunteer shift.

## Shayla

### **Donor Profile: Foundation officer / Mental Health Advocate**

You strike up a conversation with Shayla at a local Rotary Club breakfast and learn she has a personal connection to NAMI's mission. Her daughter struggled in middle school and high school with depression, anxiety, and disordered eating. After therapy and treatment, her daughter is in recovery and recently graduated from State College, an accomplishment Shayla is immensely proud of her daughter for accomplishing.

Shayla said she remembers how isolated she felt trying to find help for her daughter and calls the time "some of the darkest days" in her life. That experience led her to advocate for youth and mental health at the state-level where she used to live. You learn she recently moved to your town to accept the role of a Program Officer at a community foundation that has not funded your group in five years.