

Name: George Smith

Title: Vice-President, Operations,

Education: BS in Business from target institution

MBA from a different institution

Age: 63-years-old

Marital Status: Married

Family: 4 children

2 grandchildren



Who he is:

George is an accomplished executive who has high expectations of himself and others. He is also generous, giving to any number of organizations, including the university where he earned his undergraduate degree. He is connected to his school via membership in sports booster groups as well as his consistent habit of annual gifts. Additionally, he serves on the business school's advisory board, and one of his children attended his alma mater as well.

Goals and Tasks:

He wants to "give back" to his undergraduate school because he's grateful for the education he received.

He wants to control the nature of his gift, deciding how and where the money should be used. He wants to ensure it helps students like he was.

He insists on getting feedback from any online system. He's unsure about giving online, so he wants confirmation that things worked and all his questions answered.

Environment:

George is very comfortable online on his computer and is becoming more so on his tablet device. While he also has a smart phone, he prefers to use it for email and reserves any kind of monetary transaction for his laptop. Typically, when he makes a gift, it is done at his desk in his study at home.

"I give back for the next generation of leaders. It is how I am making the world a better place."

Name: Sarah Stout

Title: principal, elementary school

Education: BA in Education, Doctoral degree in education

Age: 43 years-old

Marital Status: Divorced

Family: 1 child

Who She Is:

Sarah is at a place in her career where she finally feels she can give back to causes she cares about. She also believes in education and its power to transform lives.



She wants to make a gift to the target institution, but this is her first time. Recently, the target institution began a program where their student teachers come to her elementary school and mentor children. It's been great success and Sarah wants to show her appreciation.

Goals and Tasks:

She wants to make a one-time gift to her region's university/college. Specifically, she wants to help the young students she sees volunteering to mentor her elementary school students.

She's busy. She is a single-mother raising a child and needs to get this gift done in one-sitting. If not, she may forget or be turned off if it's too complicated.

Sarah thinks what she's doing is very generous. Yes, her gift isn't going to build a building, but it's a lot to her. As such, she wants to be treated well and have her generosity acknowledged.

Environment:

Sarah loves her new tablet. She's able to carry it around easily and now likes to engage anything online with it. Movies, Amazon, news—it all works right there, so why use anything else.

“This makes me feel good. I want to help people and helping future teachers is the best way to do that.”

Name: Marco Gutierrez

Title: Senior at target institution, president of the student body

Education:

Is about to graduate with a B.S. in political science. He is also enrolled in law school at another institution

Age: 22-years-old

Marital Status: Single

Family: No children

Who He Is:

Marco loves his school, but also can't wait to graduate. Still, he'll miss all his friends and all the activities that have mattered to him.

For Now, he's heading up a committee that is going to make a senior class gift. The committee has decided to make a donation to the library's common area, so he has a specific gift in mind.

Goals and Tasks:

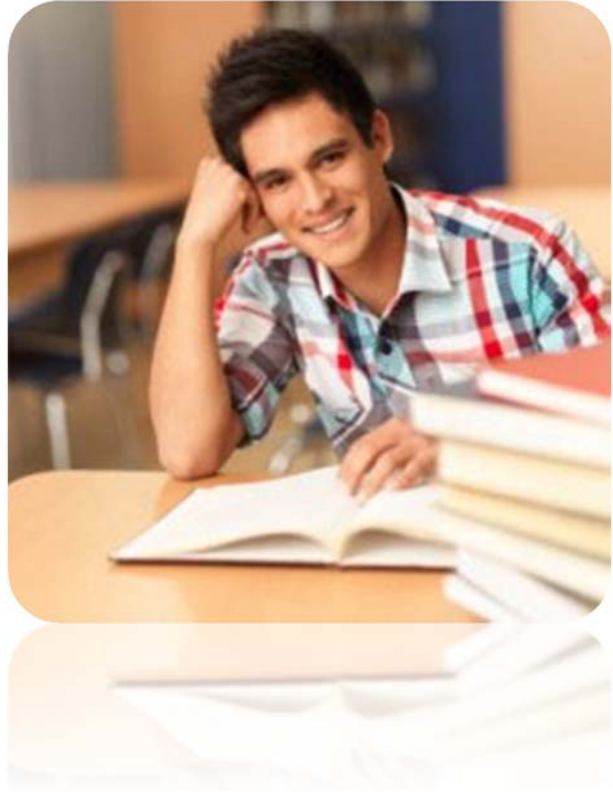
For Marco, this is one of many tasks to get done before graduation.

Marco is making the gift, but it's not his money, so he has to make sure he gives to the right place.

Environment:

Marco loves his Samsung Galaxy. He lost it for one week, and was pretty much lost himself as everything is on there and it's about the only way he interacts with others and the digital world. When he makes this gift, he probably will take a second to sit down from walking across campus and doing it between classes.

"I've got a lot on my mind right now. I want to do this right, but I also want to do it now."



Name: Jennifer Chen

Title: Professor of Economics, Bigelow Chair

Education: Doctoral Degree and her lower degrees are from a different institution other than target institution.

Age: 42 years-old

Marital Status: Married

Who She Is:

Professor Chen came to work at the target institution because of the opportunity to work with Professor Sorrensen. Sadly, Professor Sorrensen passed away last year after a lifetime of scholarship.

Now, professor Chen is interested in honoring Professor Sorrensen's legacy and giving to a fund that was started in her late colleague's name by his family.

Goals and Tasks:

She wants to give to an existing fund.

She wants the gift to be discreet as she doesn't want to share any of this information with her university colleagues. So she wants to make the gift in memoriam, but also anonymous.

Professor Chen is approaching finals. There is also a pending grant application, a publication she needs to redraft, and email piling up.

Environment:

Professor Chen has a multitude of devices. However, the gift she plans to make will be what she considered a lot of money. So she plans to make it from her office on her desktop. But she will likely be interrupted by other demands on her time.

“I am committed to make this gift in the memory of someone who I truly respected. But if I can't accomplish it one sitting, I will return to make it again.”



