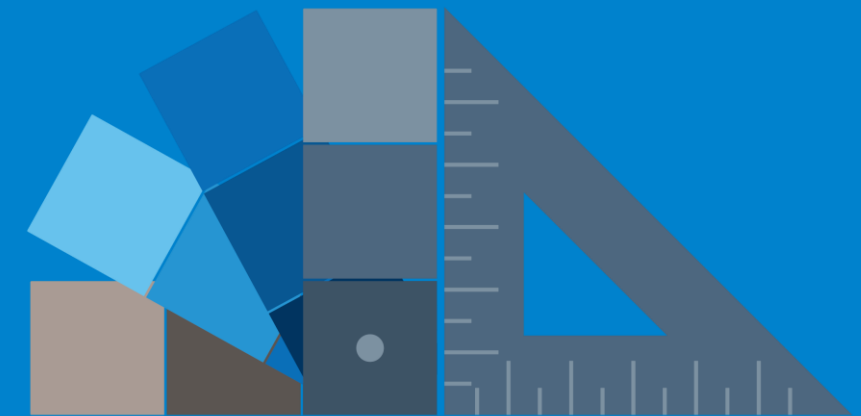




# CapDev Workshop

Greensboro | 3.14.24



## The Art & Science of Creating Campaigns





## About Us

### Our Principles

#### Enlist

We identify and connect leadership.

#### Empower

We partner to build sustainability.

#### Embolden

We encourage talent and leadership.

#### Embrace

We transform lives through relational philanthropy.

Since 1984, CapDev has been making nonprofits better through inclusive philanthropy consulting and search services.

### Our Mission

CapDev partners with nonprofit communities to enlist, empower, and embolden its leaders to embrace the transformational power of inclusive philanthropy.

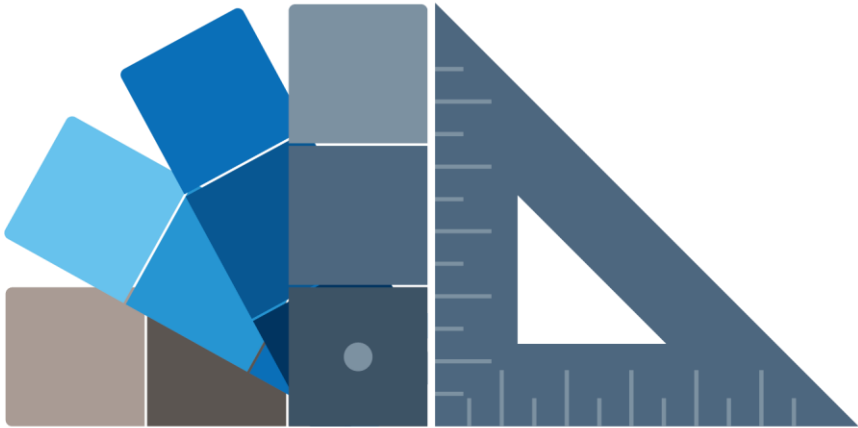


*Serving nonprofits across the Southeast since 1984*

○  
Development Planning & Campaigns  
Executive Search



# The Art & Science of Creating Campaigns



## The Art & Science of Creating Campaigns

CapDev

Welcome!

---

Workbook/Flash Drive

---

Agenda (next slide)

---

Logistics

---

Introductions

---

Download PPT: [www.capdev.com/conferences](http://www.capdev.com/conferences)

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Contact: [cjordan@capdev.com](mailto:cjordan@capdev.com)

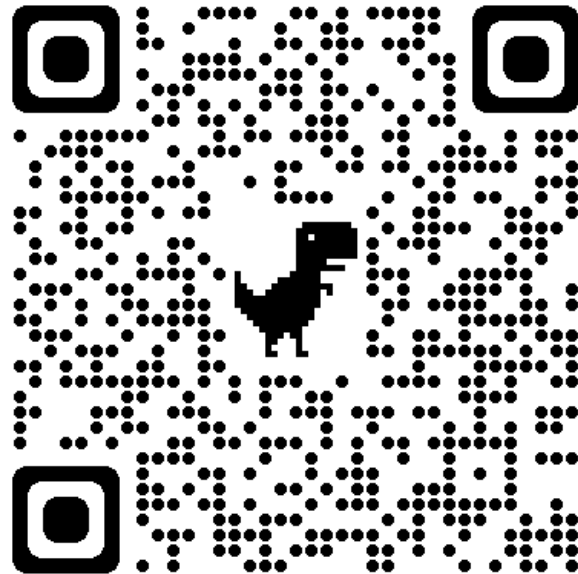


# Agenda & CapDev Team Introductions



- **Setting the Stage:** interpreting recent giving trends
- **Campaign Readiness:** internal capacity building
- **Start with Why:** building your case for support
- **Lunch** with Special Guest
- **Leadership:** the key to campaign success
- **Donor Relations:** donor development & art of the ask
- **Conclusion & Takeaways**

Download today's slides:





# Introductions



Name

Position

Organization

What do you want from today?



# Awards!

## CapDev Feather in Your Cap



1. Longest distance
2. First to register
3. Squeezed in
4. Greensboro locals
5. Attended Welcome Reception
6. Longest-term CapDev client
7. Current clients
8. Past clients





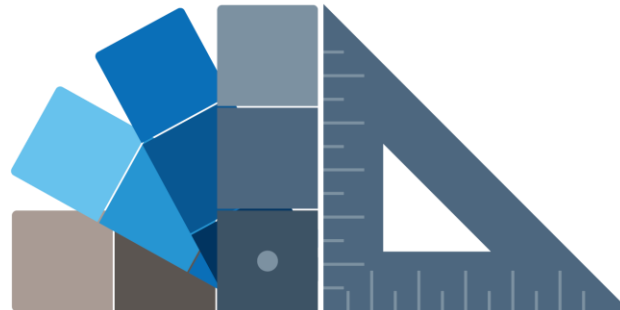
# How are Campaigns Created?

## The *ART* of Creating Campaigns

- Meeting people, making connections
- Building relationships
- Creative stewardship
- Strategizing & designing:
  - Events
  - Letters
  - Digital content

## The *SCIENCE* of Creating Campaigns

- Analyzing development programs
- Collecting results of events, appeals...
- Constructing & maintaining database
- Data analytics formulas
- Moves management
- Gift charts
- Budgets & timelines



# SETTING THE STAGE



9:30 – 10:15

INTERPRETING  
RECENT GIVING  
TRENDS

KEVIN



# What Trends are Shaping Philanthropy in 2024?

## *Chronicle of Philanthropy's* Top 5 Trends:

- A.I.
- DAFs
- Recruiting new young donors
- Polarization
- Staff Retention





## The Newest Trend: Where is A.I. in F.R.?

### **Use of Artificial Intelligence in Fundraising is having a moment.**

- Why are nonprofits slow to embrace AI?
- Ethical considerations nonprofits must navigate when using AI
- Specific examples: how nonprofits can use AI to enhance outreach, fundraising, operation:

Podcast (38 minutes):

***The Social Impact Show “Harnessing the Power of AI: Strategies and Challenges*** is available on:

- [Spotify](#)
- [Apple Music](#)

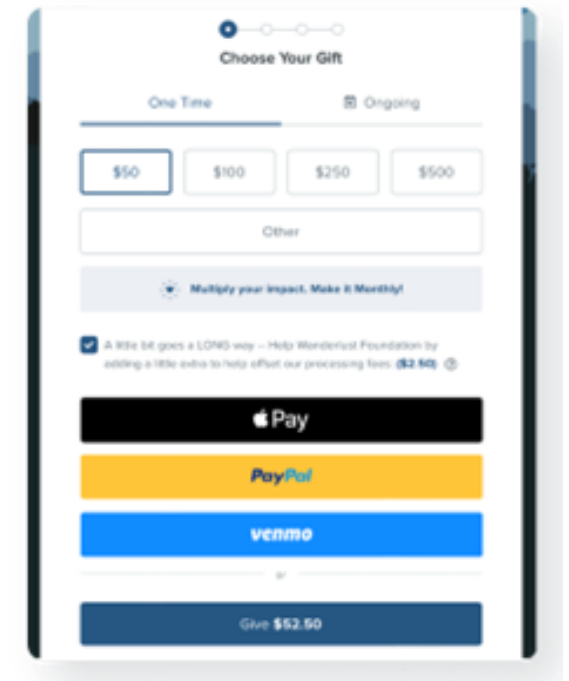


# More Tech Trends for 2024

## Top 5 Trends Nonprofit Tech Trends to Watch This Year:

1. A.I. in fundraising
2. Recurring donors and giving flexibility
3. Peer-to-Peer fundraising as an acquisition tool
4. Unconventional donors
5. Digital wallets for easy payments

from [Nonprofit Tech for Good](#) 12/2/2023





# Starting with Science: Giving Trends Analysis



DONORS

-7.6%

(+/- 3.5%)

YOY change



DOLLARS

-1.1%

(+/- 3.0%)

YOY change



RETENTION

-1.3%

(+/- 0.5%)

YOY change

## FEP 2023 Q3 Report from AFP:

- ↓ number of donors
- ↔ total amount given (flat)
- ↓ retention rates
- = less donors, larger gifts

## Declining Donor Retention Rates:

- Fewer donors every year
- 25% of gifts from MG (2% of donors)
- Repeat donors = 42%
- One-time donors = 58%
- Fewer orgs reporting data

*Do you know your donor retention rate?*

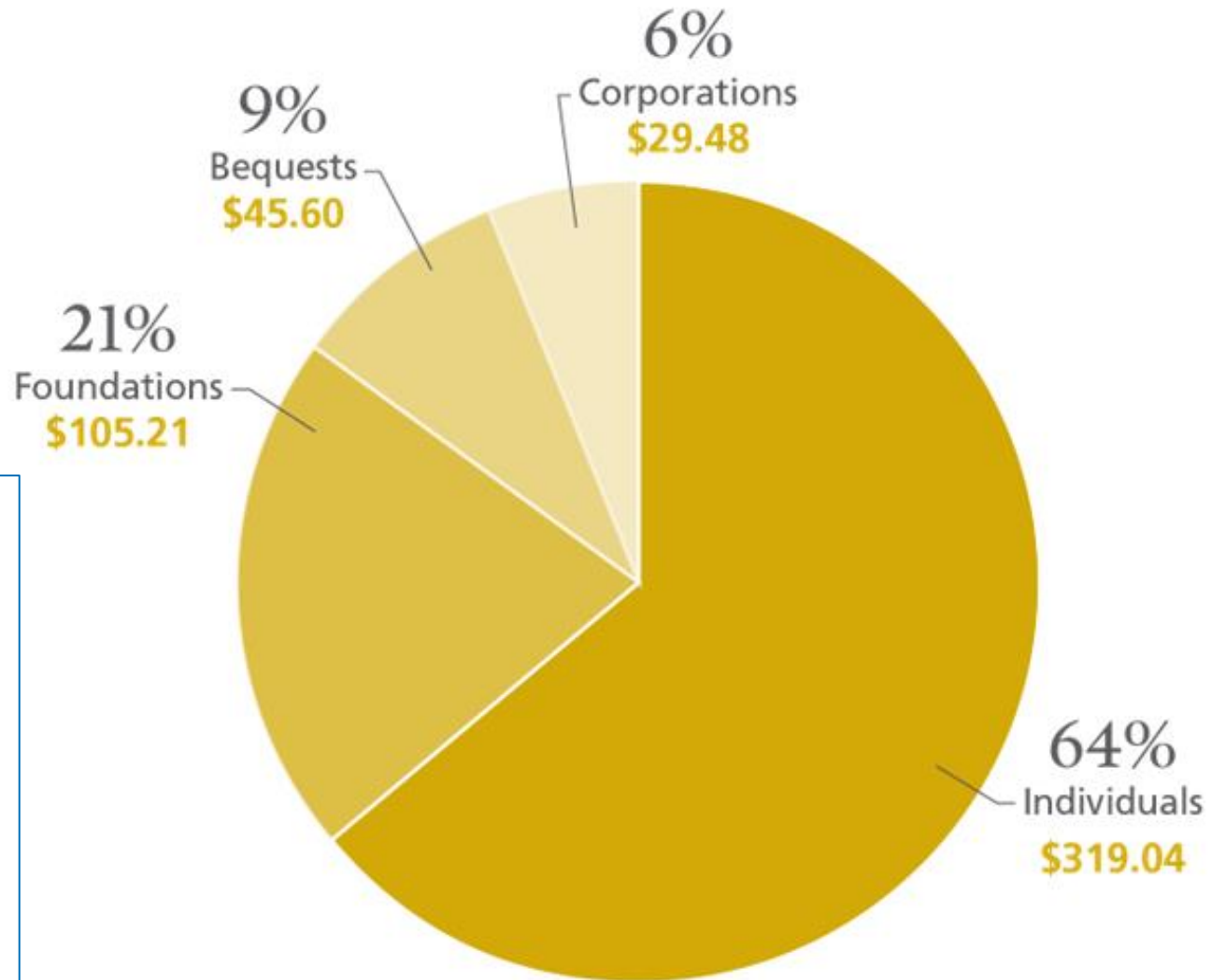


# Sources of Giving: \$499.33 Billion in 2022

3.4%  
decline

## 2022 Donor Advised Funds

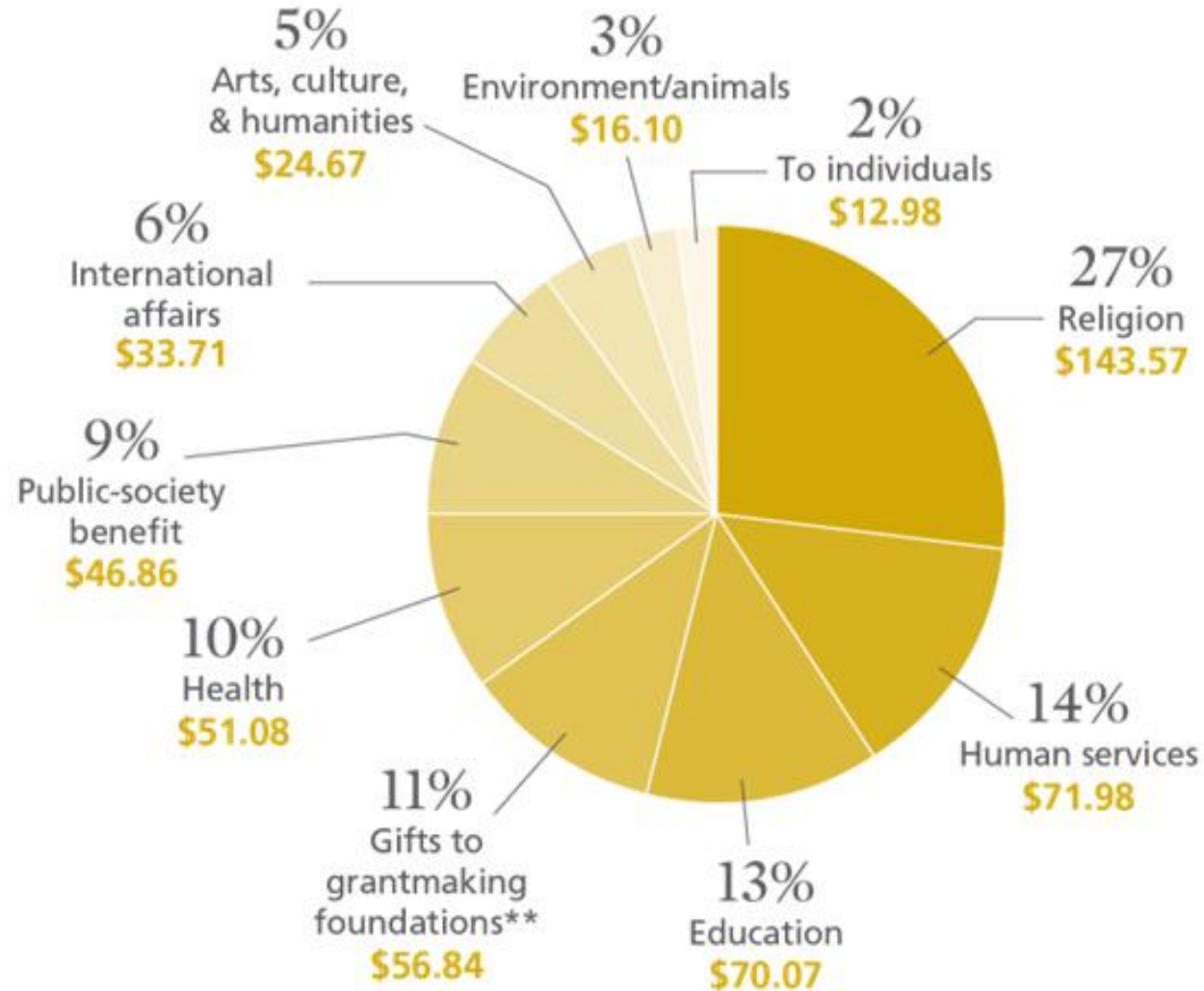
1,151 sponsoring organizations  
Grants from DAFs increased to \$52.16 billion, a new high  
Contributions and grants grew in tandem each with 9% growth  
Total charitable assets in DAFs declined slightly to 228.89 billion  
DAF payout rate declined to 22.5%





# Recipients of Giving: \$499.33 Billion in 2022

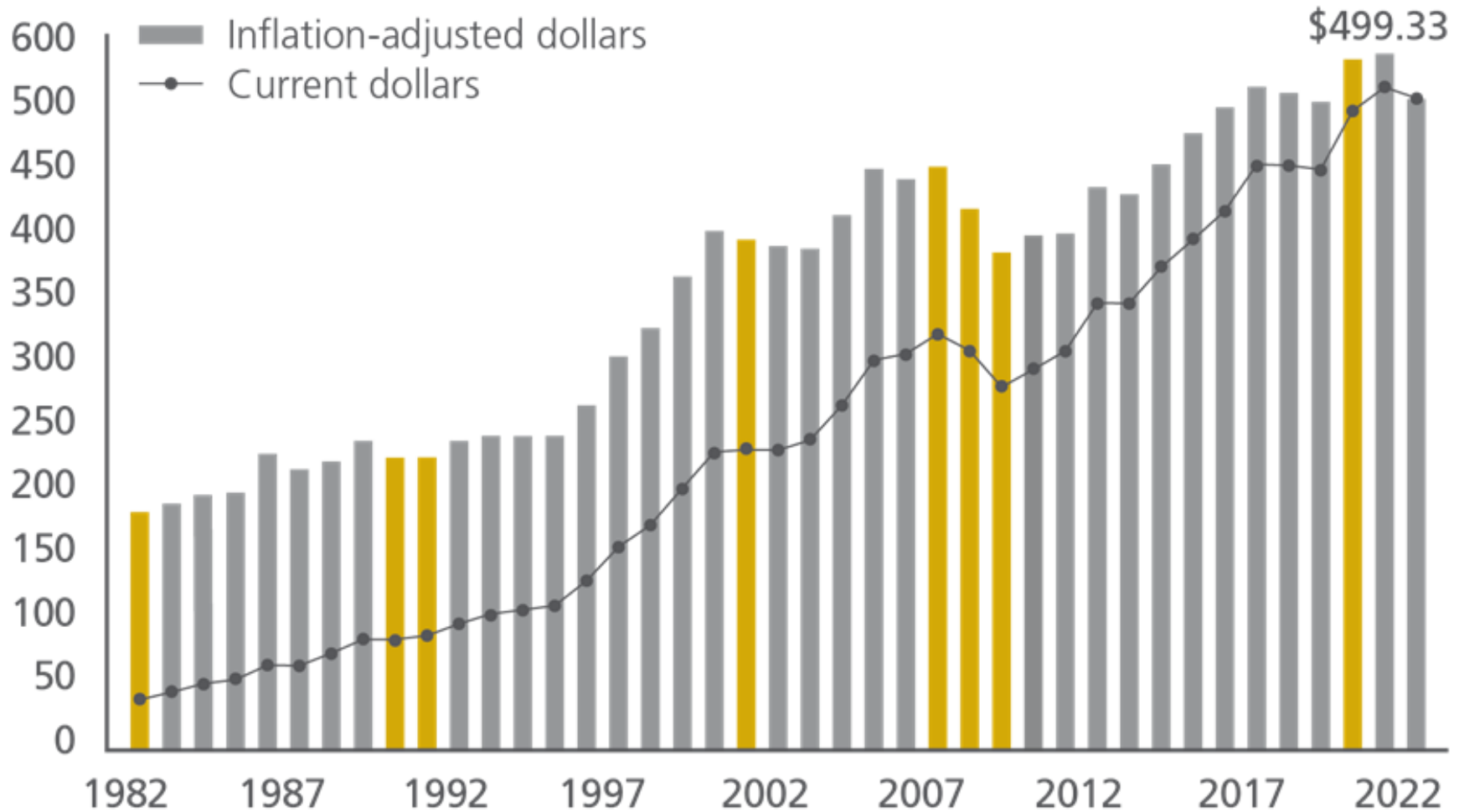
3.4%  
decline







# Total Giving Over 40 Years: 1982-2022





# Takeaways from High-Net-Worth Philanthropy Study

## What HNW Donors Care About:

- Charitable giving is important: 90% give; to average of 7 orgs.
- Women at forefront: 93% W vs. 87% M
- 50% give jointly with partner
- Diverse donor universe - give to:
  - 63% Basic Needs
  - 50% Religion
  - 45% Education
  - 42% Environment
  - 40% Health
- Impact matters: 48% volunteer
- High expectations: organizational efficiency/governance; trust/privacy; communications/f-up
- Plan to maintain giving levels: 84%
- Confidence in NP's abilities to address important issues: 86%
- Have a strategy for their giving: 49%
- Have a budget for their giving: 48%
- Giving knowledge:
  - 4% expert
  - 52% knowledgeable





# Know the High-Net-Worth Donors' Why

## Why HNW Donors Give:

- 54% - belief in the mission of the organization
- 44% - believe their gift can make a difference
- 39% - personal satisfaction, enjoyment or fulfillment
- 36% - support the same causes annually
- 27% - giving back to the community
- 23% - adhering to religious beliefs
- 18% - tax benefits

## Why HNW Donors Stopped Giving:

- 41% - too frequent solicitations
- 40% - household circumstances changed
- 18% - organization not effective
- 14% - asked for inappropriate amount





## Notable Results of BOA's HNW Donor Study

94% would like to be more knowledgeable about giving to the organization!

72% do not involve their children/relatives in their giving (but among those who do, 77% found the experience personally rewarding)

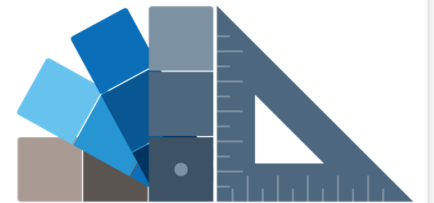
They intend to leave the majority of their estate to their grand/children (75%); and intend to leave 12% to charities



# What's Up With the \$41 Trillion Wealth Transfer?

## It's now estimated to be over **\$73 Trillion!**

- 1999 BC projection: \$41 Trillion will be transferred via estates during the next 50 years
- Estimated \$6 Trillion of that total will benefit nonprofits
- 2014: \$41T → \$59T
- 2022 → \$73T as almost half of all U.S. wealth transferred over the next quarter century will come from the top 1.5% of households





# So How Can I Raise More Money Based on Trends?

## **10 Ways to Raise More Money in 2023**

1. Ensure your mission, vision and values resonate
2. Set stretch-but-realistic goals and objectives
3. Engage everyone in the donor relations process
4. Focus on major gifts
5. Board-led
6. Ask unabashedly for unrestricted gifts
7. Prepare for the largest wealth transfer in history
8. Collaborate like the world depends on it
9. Walk the DAF talk
10. Invest in fundraising training



“If you want advice, ask for money.  
If you want money, ask for advice.”

# CAMPAIGN READINESS



10:15 – 11:00

INTERNAL CAPACITY  
BUILDING

CLARE





# Types of Campaigns



**Capital:** making a capital investment; often building/reno.



**Endowment:** to build up reserves or endowment funds



**Major Gifts:** targeted initiative for special projects



**Annual:** ongoing operational funds



**Comprehensive:** combination “the kitchen sink”



# Purpose of Campaigns



## Why undertake a campaign?

1. To successfully raise funds to meet or exceed a goal.
2. To significantly increase:
  - Recognition and value of the organization
  - Number and gift levels of donors
  - Fundraising capacity and abilities of the organization
  - Quantity, quality and commitment of volunteer leadership
  - Long-term financial stability



# Getting Started

Strategic Planning



Financial Planning



Consensus Building



Critical Element



# Essential Tools to Build a Campaign



*building a*  
**Philanthropy**  
**TOOLKIT**

- Capacity ←
- Case for Support
- Leadership
- Donors



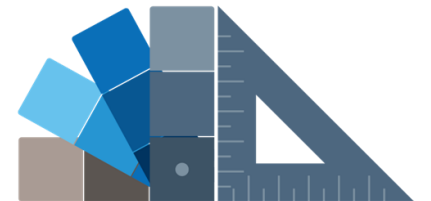
# Capacity



# Campaign Preparation

## Before You Start, Do You Have:

- ✓ A compelling strategic [vision](#) for the organization (such as from a recent strategic plan)
- ✓ A clear and well-vetted [case](#) for philanthropic support
- ✓ A thorough [assessment](#) of “campaign readiness,” (including meaningful engagement of key volunteers and donors, and an internal assessment of fundraising effectiveness, staffing and systems)
- ✓ Analytics to determine the giving capacity and identify gaps in the [gift chart](#)
- ✓ A written [campaign plan](#) that includes goal(s), timeline, fundraising strategy and budget
- ✓ A strong and highly engaged [volunteer leadership](#) group
- ✓ Unanimous [support](#) from the board and executive leadership (including clear understanding of their own roles and responsibilities)
- ✓ True [enthusiasm](#) for the campaign throughout the organization





# Are You Ready?

## Organizational Structure

- 501c3 tax-exempt status
- State charitable solicitation license
- Approved plan of action with defined objectives
- Operational budget with financial capability for fundraising objectives
- Community awareness

## Vision

- Clear Vision and Mission Statement
- Current Strategic Plan
- Elements to develop a Case for Support
- Leadership awareness of purpose/need for campaign

## Leadership

- Strong Board of Directors' support
- Community leadership represented on board
- Executive staff buy-in
- Consideration of potential campaign leaders

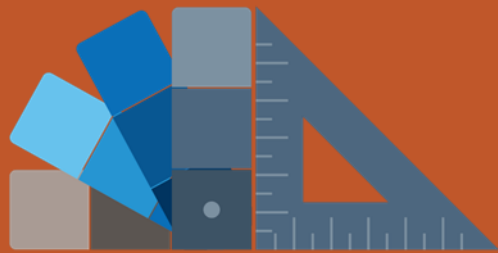
## Donors

- Database of past and current donor records
- Active use of board relationships
- Prospective major donors identified (and possibly cultivated)

## Infrastructure



- Office and staff capacity to support fundraising effort
- Compelling communication tools
- Efficient database software



The Art & Science  
of Creating Campaigns

# Campaign Readiness Exercise



# Workshop Workbook: page 9



## Campaign Readiness Rating

Use this checklist as a scorecard and guide to help determine what your organization needs to be ready to plan and prepare for a major campaign:

✓	Action to be Accomplished	Rating*
	<b>ORGANIZATIONAL STRUCTURE:</b>	
	501c3 tax exempt status	
	State charitable solicitation license or exemption up-to-date	
	Operational budget with financial capability for campaign's objectives (prepared proforma budget for campaign project if applicable)	
	Community awareness	
	<b>VISION:</b>	
	Clear mission and vision statements	
	Current strategic plan	
	Campaign objectives to develop a case for support with compelling appeal	
	Leadership awareness and support of purpose/need for campaign	
	Proposed campaign meets a valid need	
	<b>LEADERSHIP:</b>	
	Strong board commitment (attendance) and support of proposed initiative	
	Community leadership represented on board	
	Board is 100% giving, and has capacity for major gifts in campaign	
	Executive staff buy-in	
	Consideration of and connection to potential campaign leader(s)	
	<b>DONORS:</b>	
	Database of past and current donor records	
	Active leveraging of board relationships	
	Prospective major donors identified	
	Cultivated donors who are ready and able to make major gifts	
	*If FS: list of 30-50 top supporters who could be interviewed in a study	
	Reliable annual campaign success (with a challenging goal)	
	<b>CAPACITY:</b>	
	Staff/office capacity to support campaign effort – CEO and development staff	
	Operating with a balanced budget	
	Maintain operational reserves, endowment or foundation	
	Compelling communications tools	
	Efficient database software to manage donor information	
	Awareness of any potential competing campaigns	

\*Rate each item on a 1-10 scale, according to how ready you feel the organization is in that area.



# The Critical Nature of Nonprofit Staffing

## **#1 Problem: Turnover** (*“Staff Shortages Examined,”* Advancing Philanthropy 1/1/23)

- Average length of stay for development professionals: 18-24 months!
- It takes 24 months for a donor to trust a development staff person
- 51% plan to leave their jobs; 30% plan to leave the field (*The Chronicle of Philanthropy*, 2021)
- #1 reason cited for leaving: didn't feel supported from the top

## **Solution:**

- Focus on retention
- Philanthropy is *everyone's* job
- Support from top staff and board
- Transition planning is not only for CEO succession



# Infrastructure



## Staffing

consider turnover;  
focus on building  
and sustaining  
relationships



## Budget

software &  
hardware, admin.  
etc. (next slide)



## Policies & Reports

Gift acceptance,  
recognition...  
Dashboard report  
formats



## Database

tracking and  
reporting + donor  
metrics



## Communications

make full use of  
tools:

### Printed Materials

**Emails** – remember  
your signature too

### Social Media

**Website** – user  
friendly? Updated?

*“You must do well to do good.”*



# Preparing Infrastructure for Campaign:

---

- Clarify Roles & Responsibilities
- Donor Management Software/Hardware
- Office Systems/Equipment
- Communications
- Policies (Gift Acceptance, etc.)
- Donor Recognition Opportunities
- Stewardship
- Staff Support
- Fundraising Counsel



# Campaign Budget

Think of the overall campaign budget as a small percentage of the campaign goal.

*Usually 8-10% range*

**Campaign Budgets** (separate from Operating Budget) **generally include:**

- Campaign staff salaries
- Travel
- Donor cultivation/events & meeting
- Donor database, office equipment
- Printing/Marketing + postage
- Donor recognition
- Campaign Counsel



# Speaking of Communications: Videos!

## How to Create Videos for Your Nonprofit Using Your iPhone

-

*NonProfitPRO, 3.1.23*

- This year, 87% of online traffic is expected to be 100% video
- Emails containing a video experience 400% higher engagement

*“The painful thing for this writer to tell you is your written words are becoming much, much less effective in moving the needle to get people to an action ... whether that’s to like, to follow, to donate, to buy,” he said. “Words are not cutting it as much. However, video is seeing a higher and higher increased conversion rate. That’s not the wave of the future, that’s the wave of the now.”*



# Communications: Donor Metrics & Reports

## Components of the Dashboard Report:

- Donor metrics measurements (ex: RFM)
- Sources of revenue (pie chart)
- Revenue vs. expenses
- Schedule of FR events
- Cost to raise \$
- YTD quarterly progress toward goals vs. actual (tre)
- Purposeful contacts (# calls, solicitations...)

Use **impact reports** (example →)

### 2020 IMPACT REPORT

Your support improves the community and it changes the world. Thank you! We are passionate about showcasing this lifesaving work that YOU make possible. Please let us know if you'd like to learn more! We are here for you.  
 — Mondy Lamb, VP of Philanthropy  
 mlamb@spcawake.org or 919.532.2086

**3,190 LIVE OUTCOMES**

- 3,172 animals adopted
- 16 returned to owner or TN'd
- 2 transferred to partner groups

**ADOPTIONS YEAR-TO-YEAR COMPARISON**

Year	2016	2016	2017	2018	2019	2020
Adoptions	3513	3424	3443	3818	4183	3172

**ADOPTIONS BY SPECIES**

Species	Dogs	Cats	Small Mammals	Other
Adoptions	1,747	1,076	348	0

**1,216 PETS FOSTERED**

382 volunteer foster families cared for young, injured or elderly animals through the Foster Care Program.  
 37.4% of all pets rescued by the SPCA in 2020 spent time in foster.

**104 HW+ DOGS**

completed a 3-month treatment for Heartworm Disease

**164,200 HOME VIEWERS**

tuned in to watch 30 episodes of the SPCA's Home Adopting Network when the Pet Adoption Center had to close its doors to the public due to COVID-19 safety restrictions.

**17,078 LBS. OF FOOD**

were shared with 7 partner agencies and the local community through the SPCA's Food Sharing program.

**5,083 ANIMALS SPAYED & NEUTERED**

- 3,885 pets altered through the low-cost Saving Lives Clinic
- 1,198 pets altered through the spay/neuter voucher program

**61,982 FIXES** Number of pets spayed/neutered through the Saving Lives clinic since its opening in 2009  
 That's 415,908 births prevented that likely would have needed shelter services.

**55,602 CALLS FOR HELP ANSWERED**

SPCA Wake helps pets stay in their homes and out of shelters by providing vital resources and assistance to people.

**1,109 ACTIVE VOLUNTEERS**

Volunteers, working both onsite and remotely, gave 39,157 hours, equivalent to 18 full-time employees.

**29,200 MEALS PROVIDED**

Low-income, homebound senior citizens receive regular deliveries of pet food and supplies through the AniMeals program.

**OTHER ANIMAL OUTCOMES**

SPCA Wake started 2020 with 220 animals in our care and took in an additional 3,282 animals throughout the year. Out of this total:

- 3,190 were live outcomes (see top of page)
- 28 died and 32 were euthanized by the SPCA or while in the care of our veterinary partners. Euthanasia at the SPCA is performed with kindness and dignity to relieve the suffering of animals who, for medical or behavior reasons, cannot be rehomed
- 252 were in our care on 12-31-20

**FINANCIAL STEWARDSHIP**

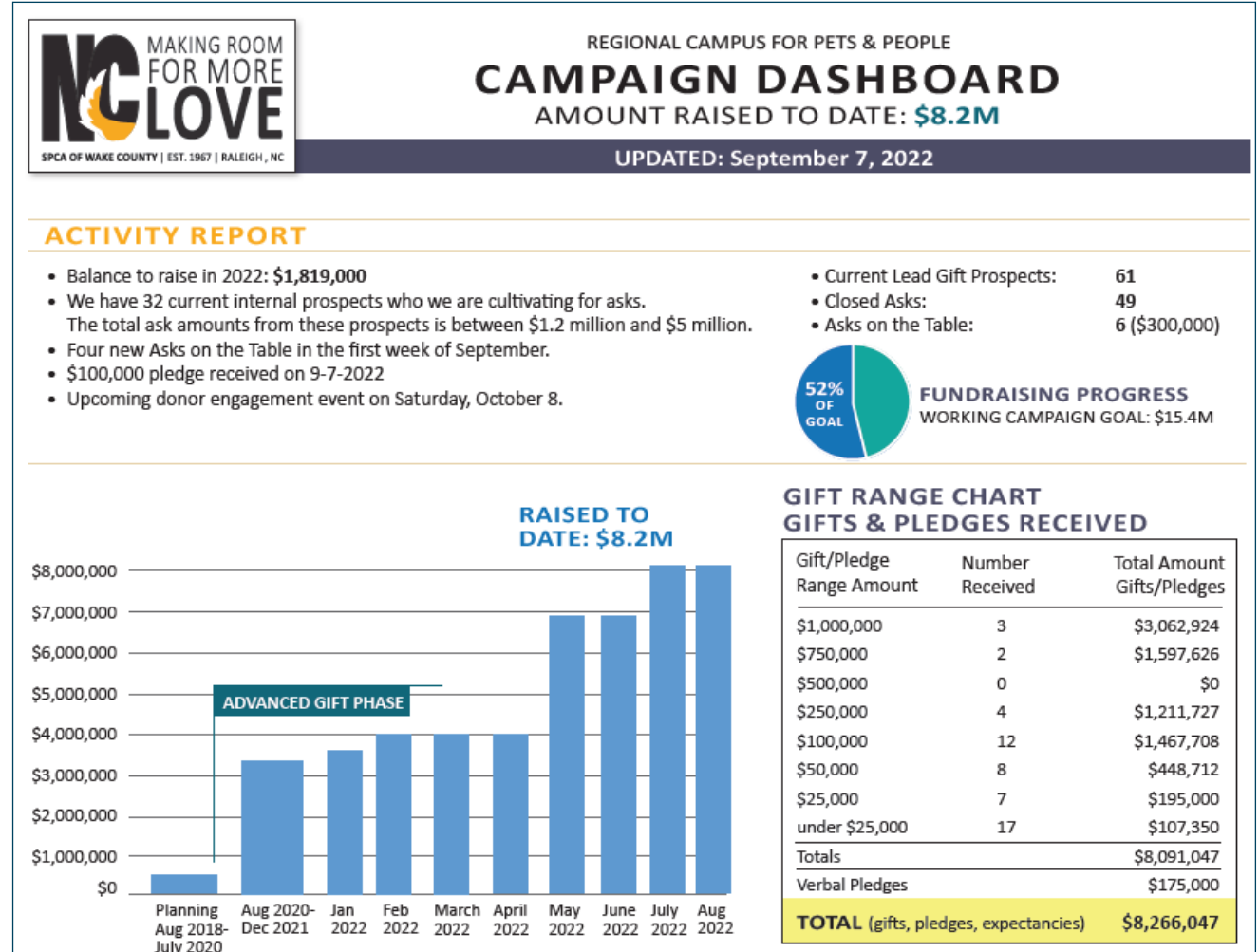
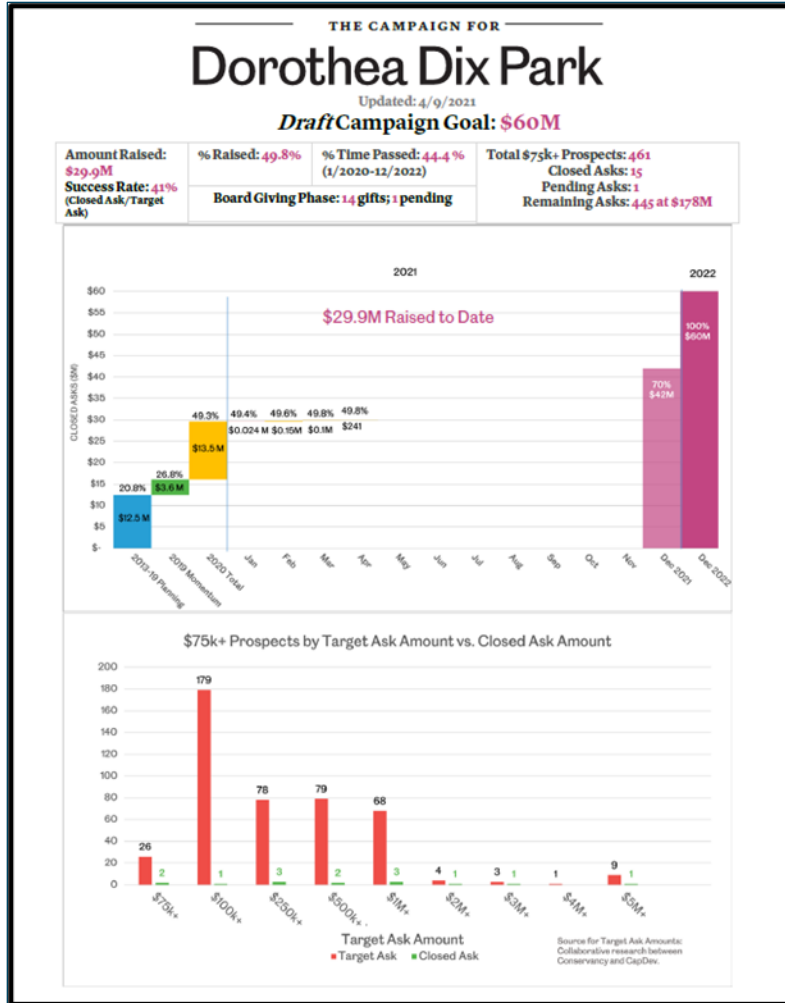
**93.17%**

Expenses\*: 93.17% goes to programs and program support and 6.83% goes to fundraising

\*source: FY20 990 Tax Return



# Dashboard Report Examples







# Communications

How **NOT** to  
write to  
donors:

Do your appeals include  
relevancy and urgency?

*Dear Friend of ABC,*

*It's been an incredible year at XYZ.  
We've grown our staff and earned a  
national distinction as a ...*

*We need the financial support of  
generous donors to keep doing this  
important work...*



# Watch Your Mouth: Words Matter

## Peacock Fundraising is all about you!

- Check your pronouns
- Focus on your audience; not on you (as in a real conversation)
- The DONOR is the hero of the story; not the organization
- Be generous as a “philanthropy facilitator;” don’t take the credit
- Offer lots of thanks!



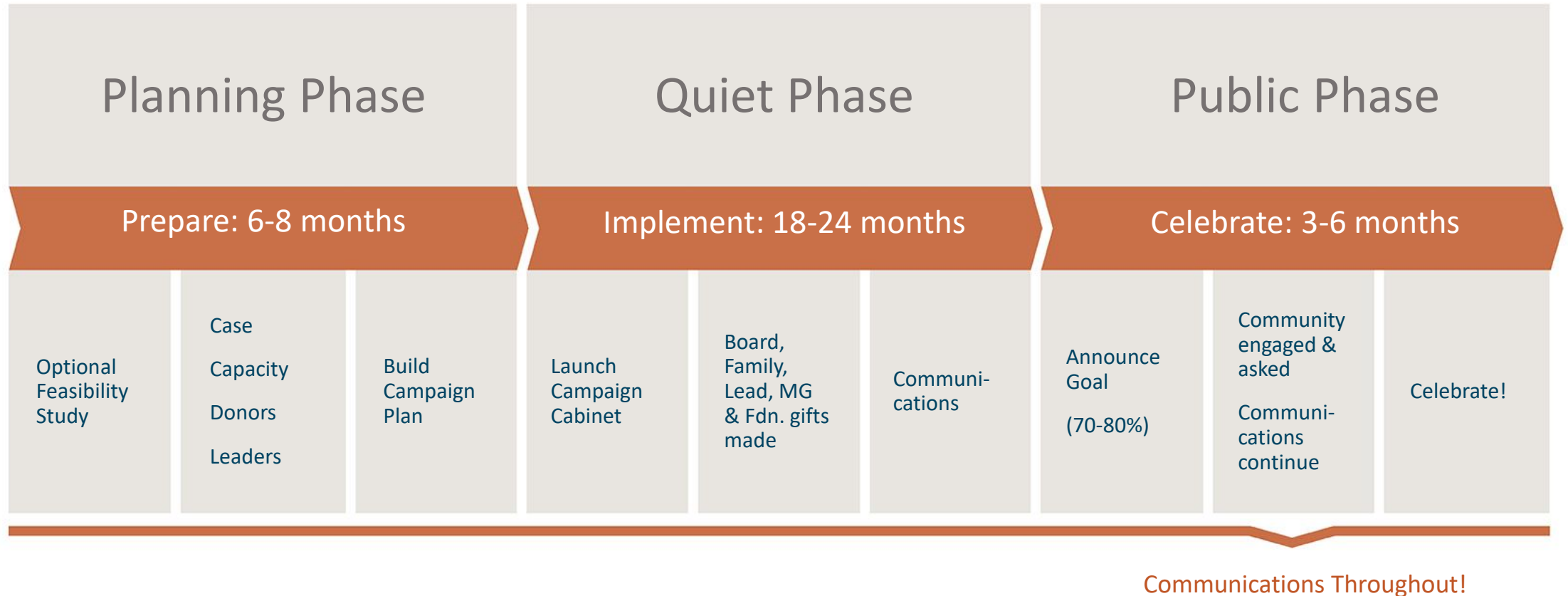


# Communications Tools & Resources

- **Phone** and **virtual meetings** are most personal:
  - Set appointments
  - Offer simple instructions & tech assistance
- **Personal notes** and direct mail have increased – element of curiosity in mailings
- **Personal emails, mass emails** (target and segment)
  - Include photo, short message – why!, link to give
  - Compelling video messages
- **Social Media:** convert followers to donors, use P2P
- **Website:** easy online giving; mobile use; optimize UX on donation page; contacts
- Live/Virtual/Hybrid Events: walks, auction, speakers
- ★ Be creative! & Keep Near, Dear & Clear with donors!



# Put It All Together: Sample Campaign Timeline





11:00 – 11:15 Break

# START WITH WHY



11:15 – 12:00

BUILDING YOUR  
CASE FOR SUPPORT

CLARE



# Case for Support



# Where is Your Focus?

*Fundraising*

*or*

*Philanthropy*



**Resource:**

***A Shift From  
Fundraising to  
Philanthropy***

-

*NonProfitPRO,  
August 25, 2021*





# Building a Culture of Philanthropy

## **Before: *Transactional***

- FR is crisis driven/reactive
- FR is a cost; not an investment
- FR is done only by few
- Special events and direct mail are emphasized
- Donors are at arms-length
- If major gifts occur, they're usually unsolicited

## **After: *Relational***

- All understand the need to raise money
- Everyone is an ambassador
- Donor-centric; not me-centric
- Visitors are welcomed
- E.D. sees self as face of the agency and is 100% committed to fundraising
- All make a gift

***Transformational!***



# The Definition of “Transactional Fundraising”



## **DIP IT!**

### **Thank you for your support**

“Your support means everything to us here at XYZ. Every dip of a credit card gives us \$10, which goes a long way in helping us fund the maintenance of the ... research, digital content, educational programs, community engagement, and overall operations.”



# What is Your Organization's "Why?"





## Address the 3 Questions of ABC

Write copy that addresses these key questions:

- A. Audience:** For whom am I writing?
- B. Benefit:** Why should they care?
- C. Call-to-Action:** What do I want them to do about it?





## What is the Donor's Why? - Five "I"s of Donor Motivation

Get to know **WHY** the donor gives:

1. To make relevant social **investment**, not just a gift
2. To see and know true **impact** of their gift
3. To fund **issues** that reflect their values and desires
4. To fund new **ideas** that effectively address needs
5. To respond to opportunities for **involvement**

He who has a Why to live  
can bear almost any How.

~ Friedrich Nietzsche



Reader's  
Digest



# Components of the Case for Support

Emotionally  
Stimulating

Intellectually  
Stimulating

Easily  
Understood

Benefit  
Oriented

Mission  
Based

Shows  
Sustainability

Timely

Compelling

Results  
Oriented



# Outcomes of the Case for Support



- Campaign Brochure
- Power Point Presentations
- Speeches
- Newspaper Articles
- Grant Proposals
- Leader and Donor Enlistment



# A Simple Case for Support Structure

Use this basic template to build your case for support:

Front:

1. Why
2. What
3. How

Back:

1. Story
2. Plans
3. Info

Capital Campaign Discussion Guide, Page 1



Capital Campaign Discussion Guide, Page 2 (backside)







# Case Crafting Exercises

# Workshop Workbook: page 26

## Exercise: Case Crafting

Ask yourself these questions:	Draft responses as basis of understanding for the Case for Support:
<b>Why are we communicating?</b> A brief summary of the organization, its mission, and problem/opportunity addressed	✨ <i>Understand your <u>purpose</u></i>
<b>Who are we talking to and what do we know about them?</b> Demographics of the target audience, how they feel about the organization, any insights into their characteristics, what inspires them	✨ <i>Know your <u>audience</u></i>
<b>What must we tell them?</b> The single essential message, a campaign slogan and theme	✨ <i>Let your "why" lead your case-writing</i>
<b>How should the audience respond?</b> What should they think, feel, do	
<b>Why will they believe us?</b> Motivating points of support – data, facts, impact, perspectives, testimonials	
<b>What is the tone of the case?</b> Use adjectives to describe the voice of the case	
<b>What does success look like?</b> Include goals that can be measured	
<b>What are the mandatories?</b> Must be accomplished in this campaign; campaign objectives and outcomes	
<b>What is the timeline?</b> When will be campaign and the project be completed?	

Use responses in the above template to inform the Case for Support.

# Workshop Workbook: page 27

## Building Your Campaign Case for Support

*A well-written, persuasive Case for Support that clearly articulates a bold vision is a critical foundation for building a successful campaign.*

CapDev's counsel and case writer will work with your team to prepare the first draft of your written case for support. We have provided a tool below to help (1) identify the goals of the campaign, (2) determine the funding priorities that will help reach campaign goals, and (3) to explain the importance of these goals to the philanthropic community.

**The thinking behind these questions will set your campaign up for success:**

1. **Campaign Goal:** *(example: Raise \$2 million to ensure that children ages 5-12 can learn about eating healthy foods and develop cooking skills in a safe after-school environment.)*
2. **Campaign Timing:** *(Why should this happen now? What happens if no action is taken?)*
3. **Funding Priorities:** *(include as many funding priorities as necessary to accomplish the goal – can be a mixture of physical space, equipment, programmatic, endowment, etc. AND a cost estimate for each)*
  - Funding Priority 1:
  - Funding Priority 2:
  - Funding Priority 3:
  - Funding Priority 4:
  - Funding Priority 5:
4. **Why:** *Why does this project matter? (draft a statement that explains the driving force behind why the goal and funding priorities will lead to better outcomes for the target population and the community, using a mixture of data and anecdotal evidence)*

**Who should be quoted in the case for support?** *Identify 4-5 constituent stakeholders (staff, volunteers, clients, donors) who can provide different viewpoints for the case writer to interview.*

- 1.
- 2.
- 3.
- 4.
- 5.



# Campaign Case Examples

## Thinking Big About Campaign Objectives

*“The mind can be convinced, but the heart must be won.”*

- Simon Sinek





# Lunch

\*Dietary Restrictions



12:00 – 1:00  
Lunch Leader Chat:  
Sandlin Douglas

# LEADERSHIP



The Art & Science  
of Creating Campaigns

1:00 - 2:00

THE KEY TO  
CAMPAIGN SUCCESS

ALLAN



# Leadership





# Leadership Enlistment

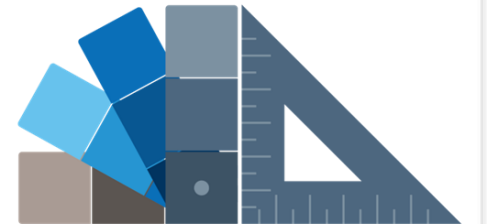
How **NOT** to  
enlist leaders:

*“Would you like to or do you know anyone who might like to be on the Board of X? I am on the board and we are desperate to find some more go-getter type women. I promise it is not much of a time commitment - six meetings a year. And I would be forever in your debt.”*



# Leadership Enlistment Process

---







# Consider All Types of Diversity

- **Diversity:** invitation to the party
- **Inclusion:** being asked to dance





# Engaging Board Members



How will you get involved with ...?

Board Member Name \_\_\_\_\_

Date Completed \_\_\_\_\_

Like/ Will do	Might Do	Don't Know	Count Me Out
------------------	-------------	---------------	-----------------

Other/Notes:

**Constituency Development**

Brainstorm to bring names	___	___	___	___
Brainstorm ways to involve names	___	___	___	___
Help cultivate these relationships	___	___	___	___
Write letters to my personal contacts	___	___	___	___
Call my personal contacts	___	___	___	___
Call donors and thank them	___	___	___	___

**Face to Face Solicitation**

Go alone on a solicitation call	___	___	___	___
Go with board/staff on call	___	___	___	___
Become a spokesman for cause	___	___	___	___
Connect with groups for presentations	___	___	___	___
Help determine gift amount for asks	___	___	___	___
Solicit people I don't know yet	___	___	___	___
Host a cultivation event among friends	___	___	___	___

**Special Events**

Help plan events	___	___	___	___
Brainstorm guest names	___	___	___	___
Invite my own contacts	___	___	___	___
Sell tickets to my contacts	___	___	___	___
Volunteer at the events	___	___	___	___

**Direct Mail/Email**

Draft letters	___	___	___	___
Send letters/emails	___	___	___	___
Use Facebook to share/like	___	___	___	___
Brainstorm prospect names	___	___	___	___
Bring in my own list of contacts	___	___	___	___
Write personal thanks <del>you</del> to donors	___	___	___	___
Sign and add notes to letters	___	___	___	___

Other:

Capital Development Services | www.capdev.com

## Find Jobs Board Members Like & Want to Do – Match with Your Needs

1. Establish expectations prior to enlistment
2. Reinforce expectations at board orientation
3. Offer a survey to offer opportunities & gain input
4. Meet individually with board members to identify their involvement
5. Formulate plans for their commitment during their term
6. Celebrate & share successes in board meetings

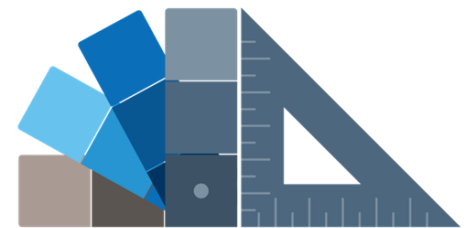


# Ways to Engage Your Board in Philanthropy

Fundraising-related activities that board members actually enjoy leading:

1. Sharing your organization's impact through storytelling
2. Sharing gratitude with existing donors
3. Creating a vision for the future
4. Recognizing special dates for existing donors
5. Representing the organization at community events and initiatives

from [Charity Village](#)





# The AAA Board + All Make a Financial Commitment

## **Ambassador**

- Cultivate and steward new & renewal gifts
- Master the elevator speech

## **Advocate**

- Share information (tell my story)
- Formal advocating within my network
- Know the case, vision, strategic plan & handle objections

## **Asker**

- Share my enthusiasm & ask for investments
- Team with other board/staff
- Have a focused purpose



# Leadership Characteristics



## What makes a great leader?

Consider types of leadership styles – for executive staff, board and campaign leadership:

- “I prefer” vs. “What if” example
- Attributes:
  - Knowledge, Reputation, Experience
  - Resources, Relationships
  - Time, Commitment





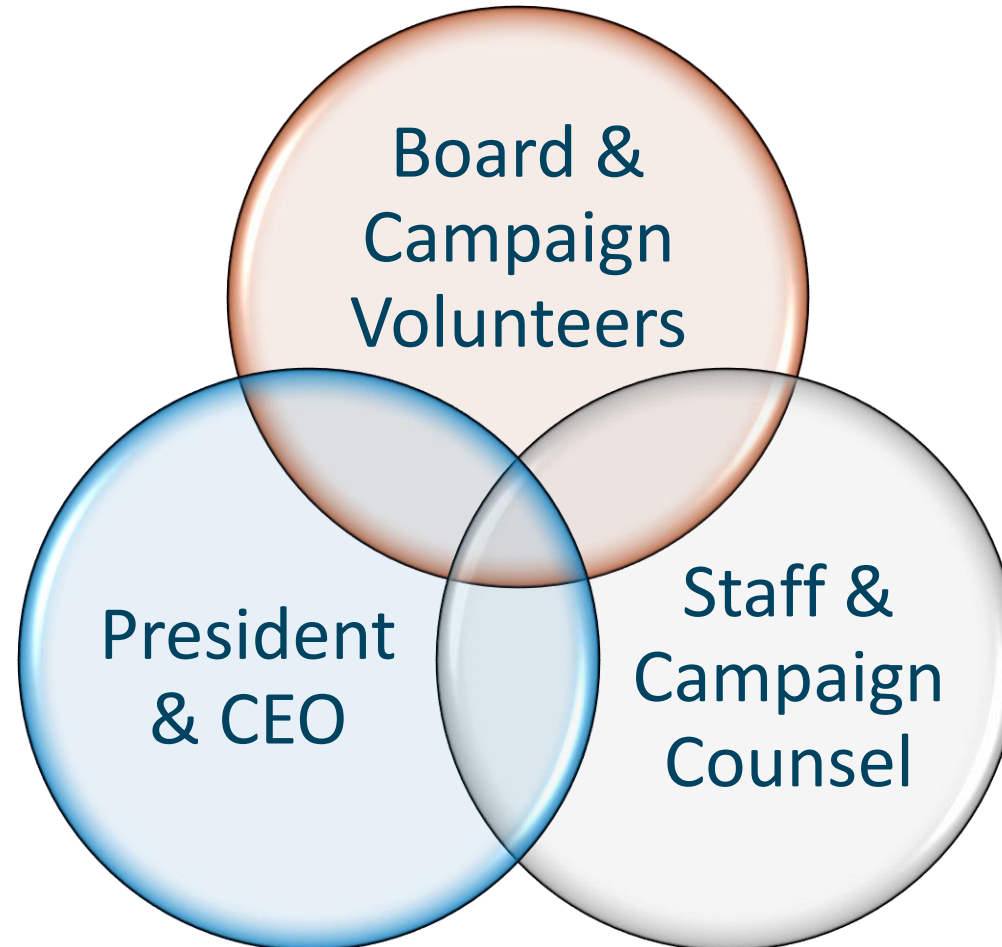
## Benefit of Empathy to Connect with Leaders & Donors

- **Empathy** is “the ability to recognize, understand, and share the thoughts and feelings of another.” – *Psychology Today*
- “**Answering why is an act of empathy** and adds a layer of persuasion to your communications. **When people know why they’re being asked to do something, they’re much more likely to do it.**” – *Harvard Business Review, “Good Leadership Is About Communicating ‘Why’”*
- “The common thread I see among successful fundraisers isn’t their technical knowledge. It’s their **ability to empathize and truly care** about their donors. True empathy can’t be faked; people can feel if it’s real.” – *Advancing Philanthropy, “Motivation and Inspiration: Empathy Is the Heart of Fundraising”*

[Empathy is the Pathway to Your Why](#), CapDev post by Clare Jordan



# Leadership Roles in Philanthropy





# Board's Role in Campaign & in Philanthropy

- **KNOW!** Understand the mission/campaign and advocate
- **OWN!** Take responsibility in campaigns
- **GIVE!** Make organization a “**Top 3**” philanthropic priority
- **INFLUENCE!** Ensure 100% board participation in giving
- **LINK!** Leverage relationships and make introductions
- **SPEAK!** Engage & educate prospective donors
- **WRITE!** Sign & send thank you notes
- **SHOW UP!** Participate in events
- **ASK!** Take part in solicitations as appropriate
- **STEWARD!** Thank and account for gifts
- **CELEBRATE!** Recognize successes!



# Tactics to Set Up the Board Chair for Success

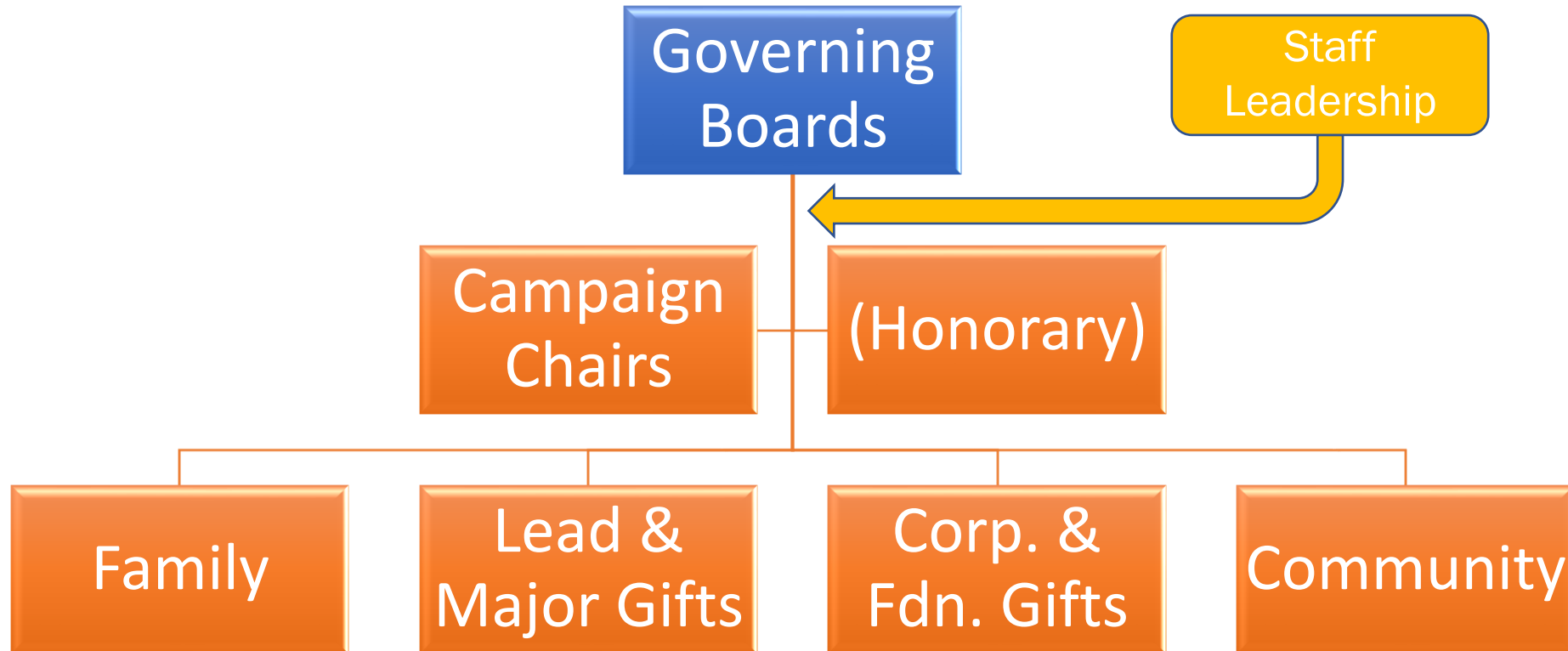
1. Long-Range Recruitment
2. Redistribution of Chair Tasks
3. Co-Chair Arrangement
4. Mentorship
5. Support Group

*“If the Board Chair Supports the Board, Who Supports the Board Chair?”* NonProfitPRO 9/11/23





# Sample Campaign Org. Chart





# Campaigns Start with a Planning Committee

The **Campaign Planning Committee** oversees the planning and preparation phase of the proposed capital campaign, and is responsible for:

1. Approval of the case for support
2. Assist with identification and evaluation of major donor prospects and campaign leadership
3. Advise on effective leader and major donor cultivation and recruitment strategies
4. Hosting a donor cultivation event, meeting, tour, or other donor educational activity
5. Review and approve campaign goals, objectives, and strategies
6. Identify and recruit **Campaign Cabinet** committee members
7. Approval of campaign budget and campaign infrastructural changes
8. Attend regular (monthly) meetings

Once the **Campaign Cabinet** is created, the work of the **Campaign Planning Committee** is complete.



# Then Appoint the Campaign Leaders:

## Characteristics:

- Knowledge
- Reputation
- Relationships
- Experience
- Commitment
- Resources
- Time

## Sources to Consider:

- Current/Past Board Members
- Current/Past Donors
- Community Leaders
- Corporate Leaders
- Potential Future Board Members
- Current/Past Committee Members
- Diversity (ethnic, gender, age, geographic...)



# Campaign Players

## What are the roles for:

- Board of Trustees
- Foundation Board
- President/CEO/ED
- VPs
- Deans/other key staff leaders
- Campaign leaders

### Notes to Remember:

- “Selected;” not “elected”
- “Board Development;” not “Nominating”
- Major campaigns are Board-led & Staff-supported





# Staff Roles in Campaign & in Philanthropy

---

- **Be prepared** and organized
- **Be sensitive** to time constraints
- **Be adaptable** to leaders' schedules
- **Be responsive** and supportive
- **Be knowledgeable** about relationships/contacts
- **Be proactive** and capture all donor details and cultivation strategies in the database



2:00 – 2:15 Break

# DONOR RELATIONS



The Art & Science  
of Creating Campaigns

2:15 – 3:30

DONOR  
DEVELOPMENT &  
THE ART OF THE ASK

LILLY



# Donors



# What is Wrong with This?

How NOT to  
appeal to  
donors:

*“As you know, I’m on the board of  
[ORGANIZATION].*

*We need to raise \$50,000 by the end of  
June or we may have to close.*

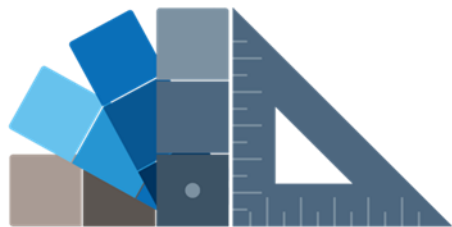
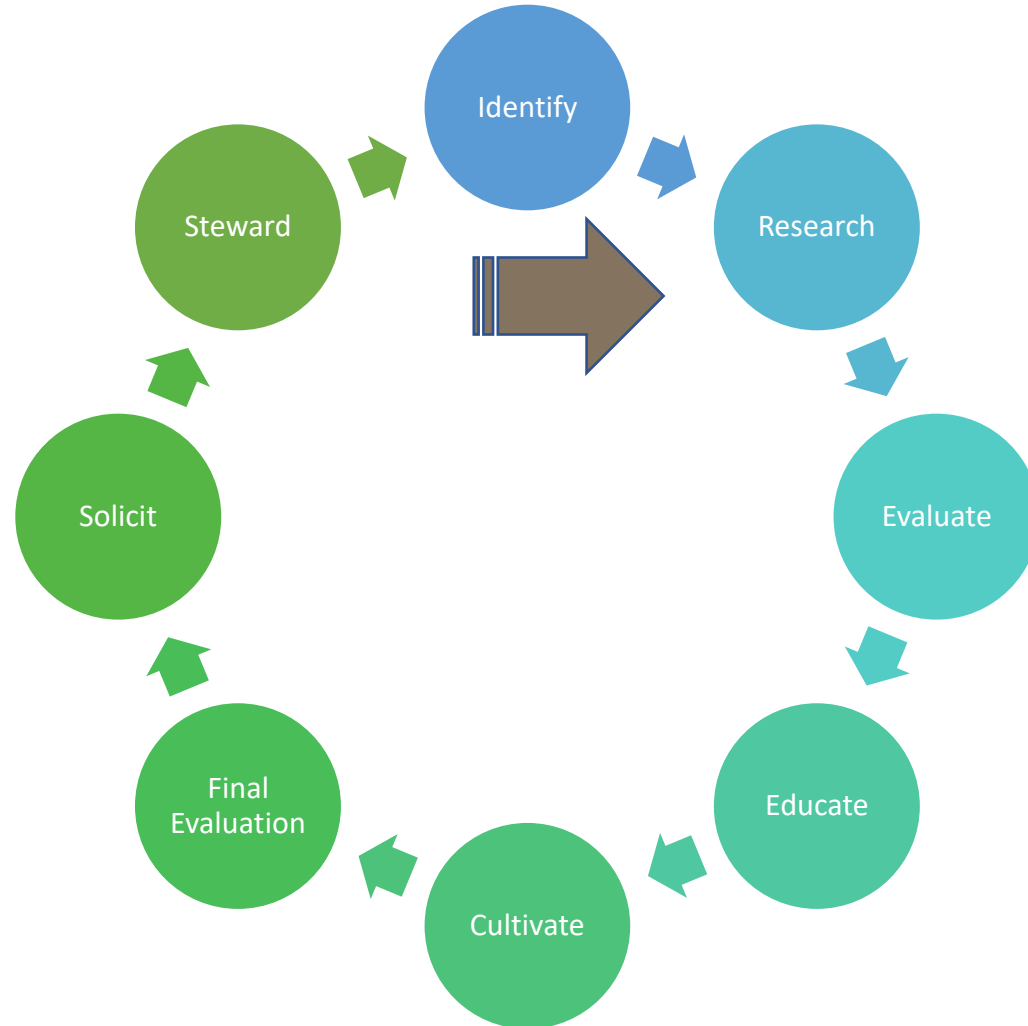
*I know you support many great causes.*

*Can you give anything to help us?*

*I promise I will not keep bothering you  
with future requests.”*



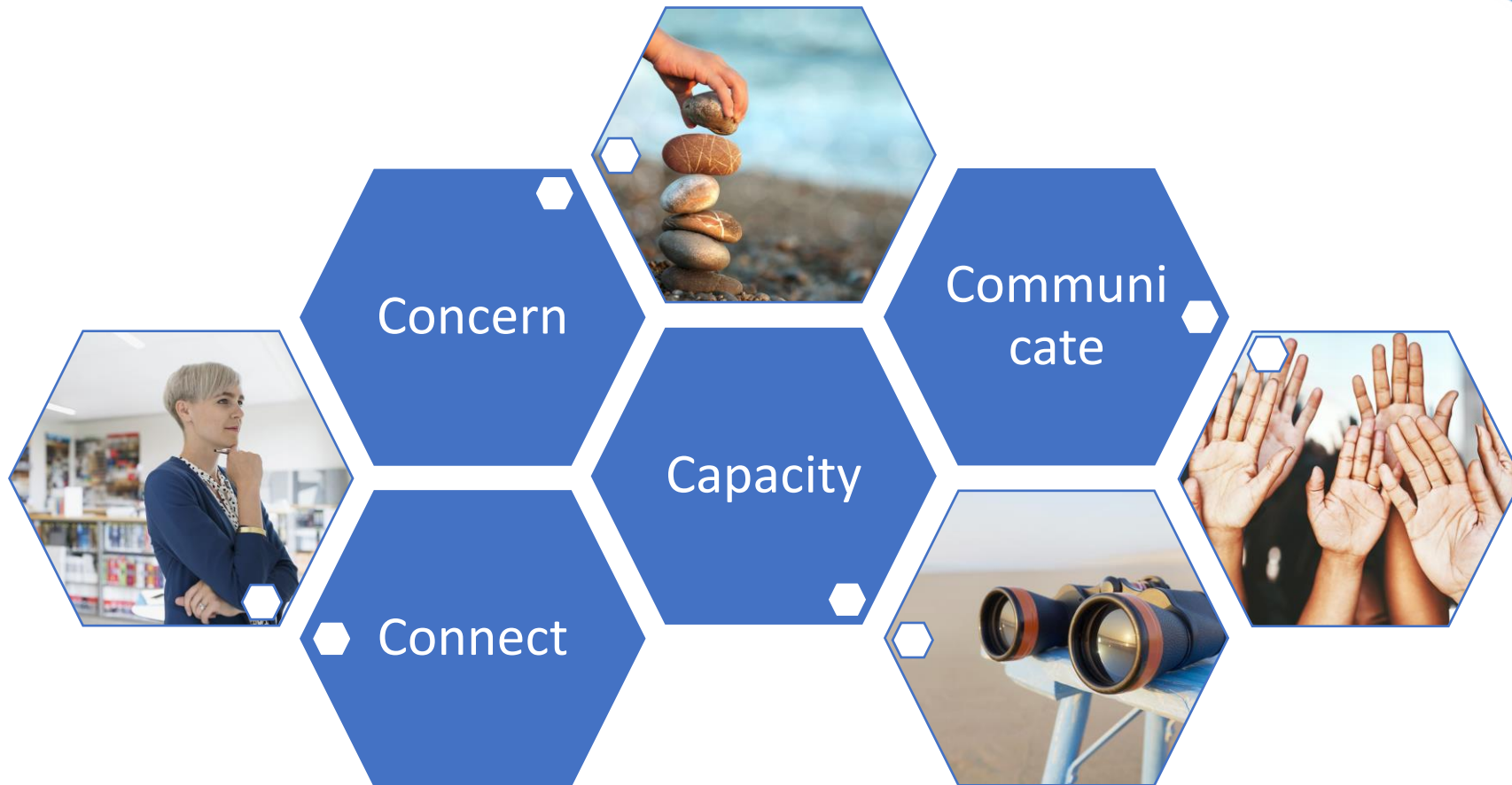
# Donor Relations Cycle





# Who Makes a Good Prospect?

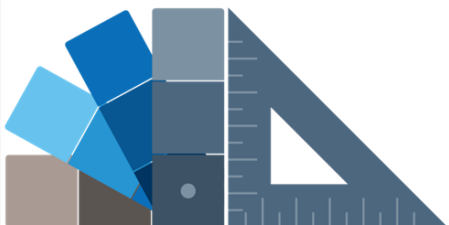
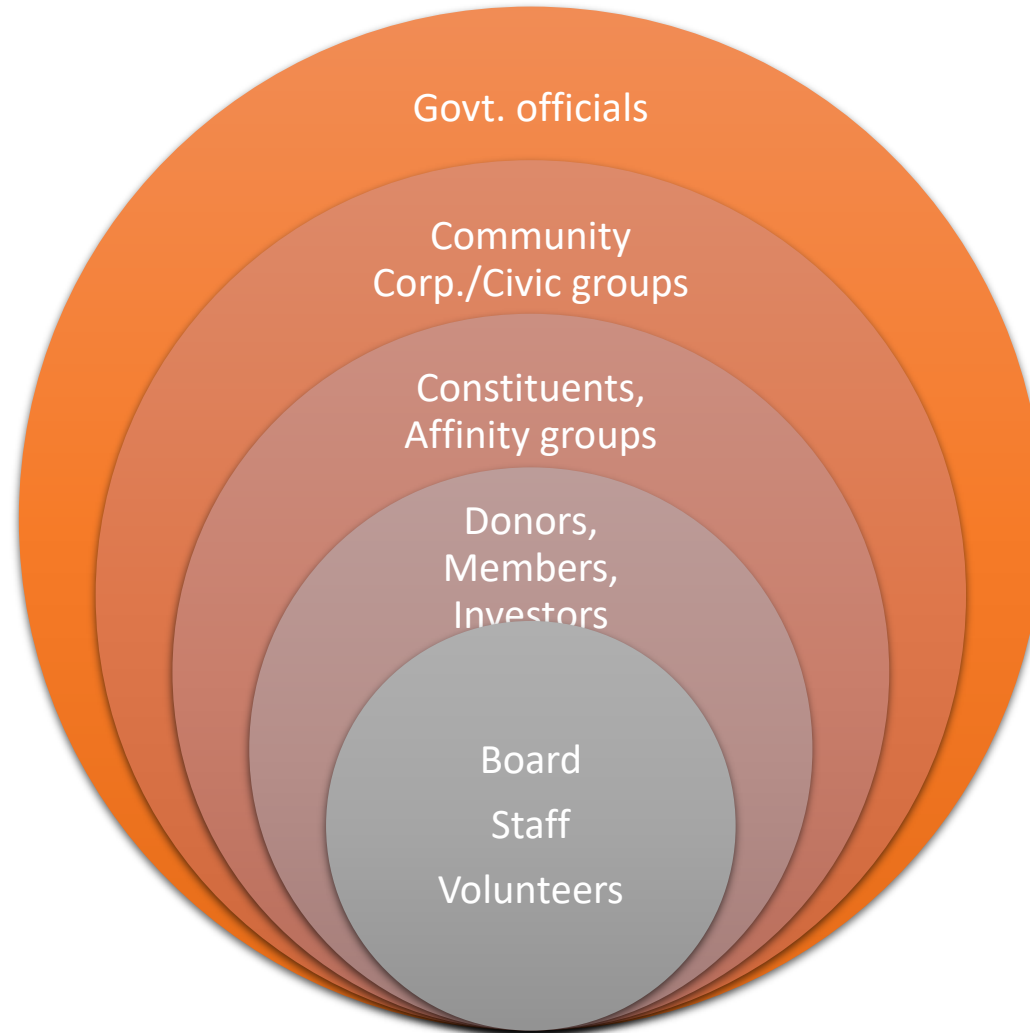
Identify





# Where to Find Supporters

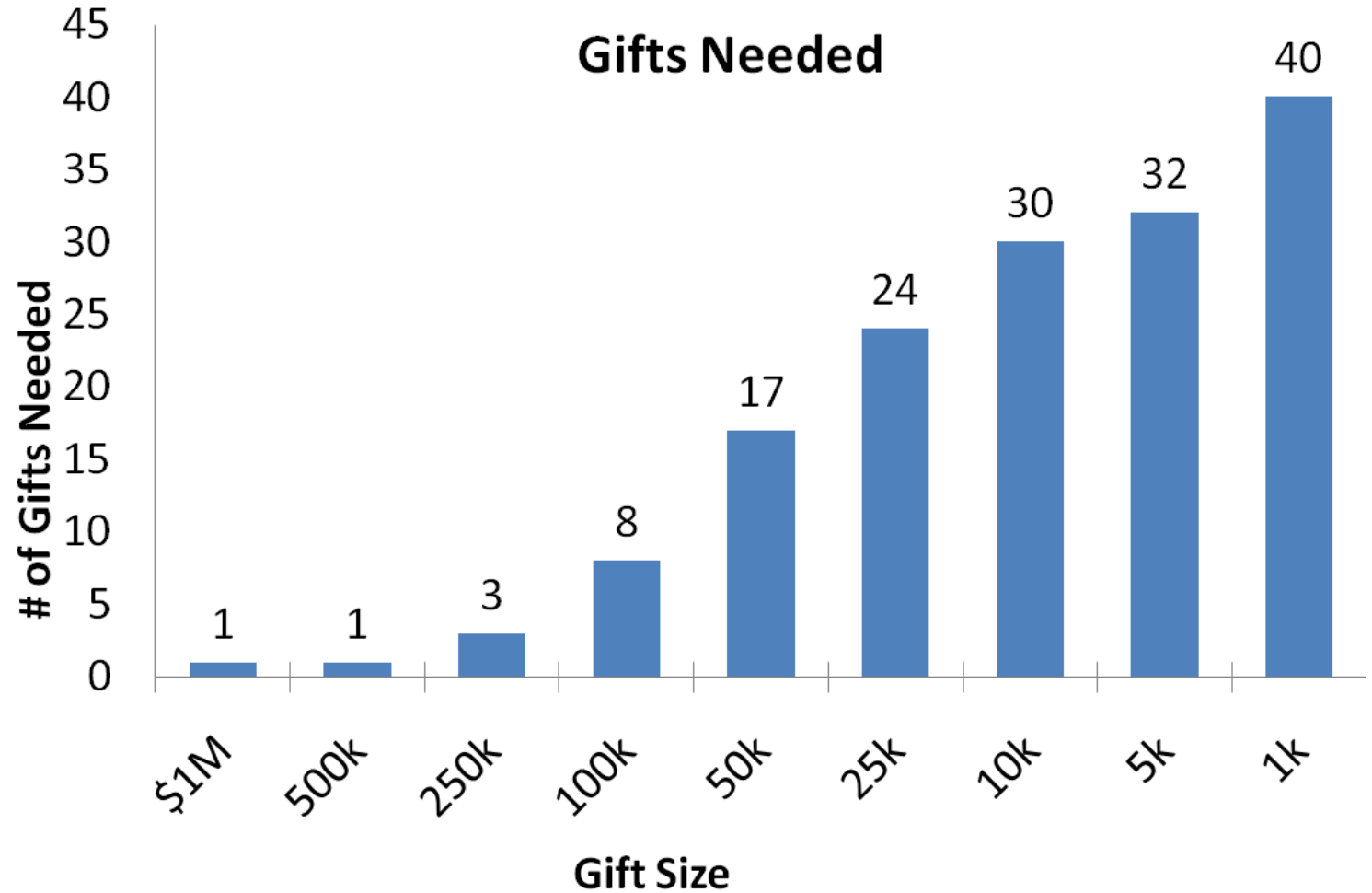
Identify







# Example: \$5 Million Gift Chart





# Indicators for Identifying Best Potential Donors

1. Those who are already giving (big):
  - RFM = Recency, Frequency, Money – *formulas on next slide*
2. People who are philanthropic
3. Current & past leaders
4. They make \$1k+ federal political contributions
5. Own \$2M+ in real estate



## **Recency**

Most recent gift received



## **Frequency**

How often they give to you



## **Money**

Lifetime dollars donated



# Data is Your Friend in Identifying Donors

Consider what you want to measure with some useful data analytics formulas:

- Annual overall rate of growth in donations (%) =  $(x-y/y) \times 100$ 
    - x = total donation revenue this year
    - y = total donation revenue last year
  - Annual average gift (\$) =  $x-y/y$ 
    - x = total donation revenue
    - y = # of gifts
- Change =  $(a-b/a) \times 100$
- a = this year's average gift amount
  - b = last year's average gift amount
- Donor lifetime value (\$) = lifespan x average donation amount x (total # of donations/total # of donors)



Identify

Workshop Workbook: bottom of pg. 26



# Prospect Research

## Prospect Research Tools in your Workshop Workbook

pages 20-24

- Overview of Prospect Research
- Prospect Research Tips
- Prospect Research Websites
- Plan of Action Template for Prospect Research





# Always Do Your Homework

## **Donor Evaluation - To Create a Donor Profile, Include:**

- Giving History
- Institutional Knowledge – data and notes
- Prospect Research
- Affinity Rankings
- Relationships



Evaluate



# Ways to Forge Stronger Connections with Supporters

1. Don't overlook average donors
2. Temper praise for big donors
3. Double down on storytelling
4. Work with other groups
5. Seek something other than money
6. Bring people together – online and in person
7. Build communities of purpose wherever possible



Educate



Cultivate

from [\*The Chronicle of Philanthropy\*](#), 7/12/22



# Understand Younger Generations' Giving



from Giving USA:  
Engaging the Next Generation of Philanthropists

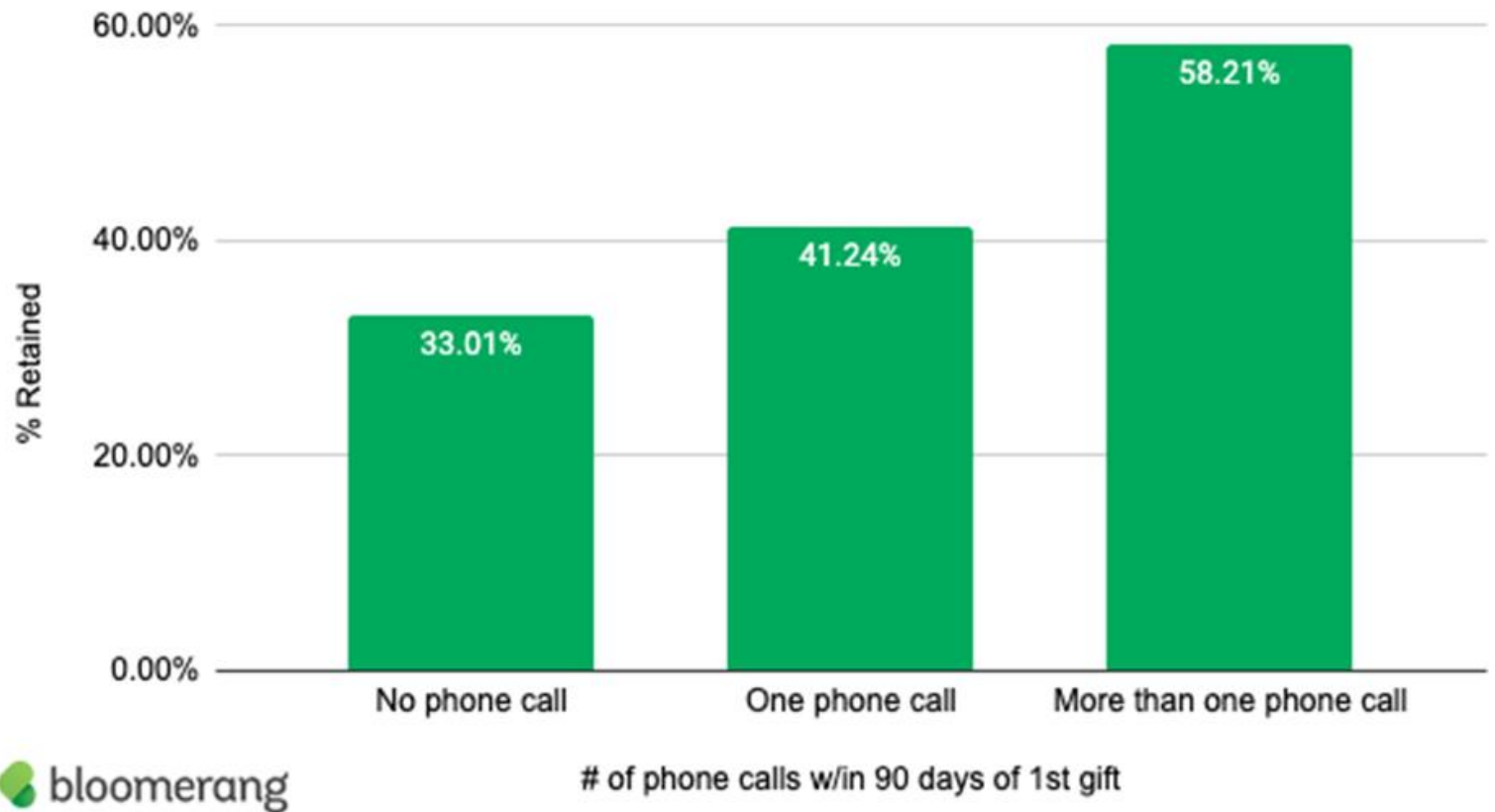


# Example: Impact of the Personal Phone Call



- First-time donors who get a **personal thank you within 48 hours** are 4x more likely to give a second gift. *McConkey-Johnston International*
- A **thank-you call from a board member to a newly acquired donor within 24 hours** of receiving the gifts will increase their next gift by 39%. *Penelope Burk*

Impact of phone calls on 1st-time donor retention







# Client Example: Using Analytics to Uncover New Donors



Background: university client

- Needed new leaders and donors in next campaign

CapDev conducted Data Analytics on school's alumni and donor database:

- Data Analytics discovered a surprising population profile in both its alumni
- Further searches using LinkedIn and Meltwater found even more evidence

*What was the surprise? What did they do about it?*



# Recognizing When to Contact MG Prospects

95% of donors don't get "keep in touch" calls from the charities they support.

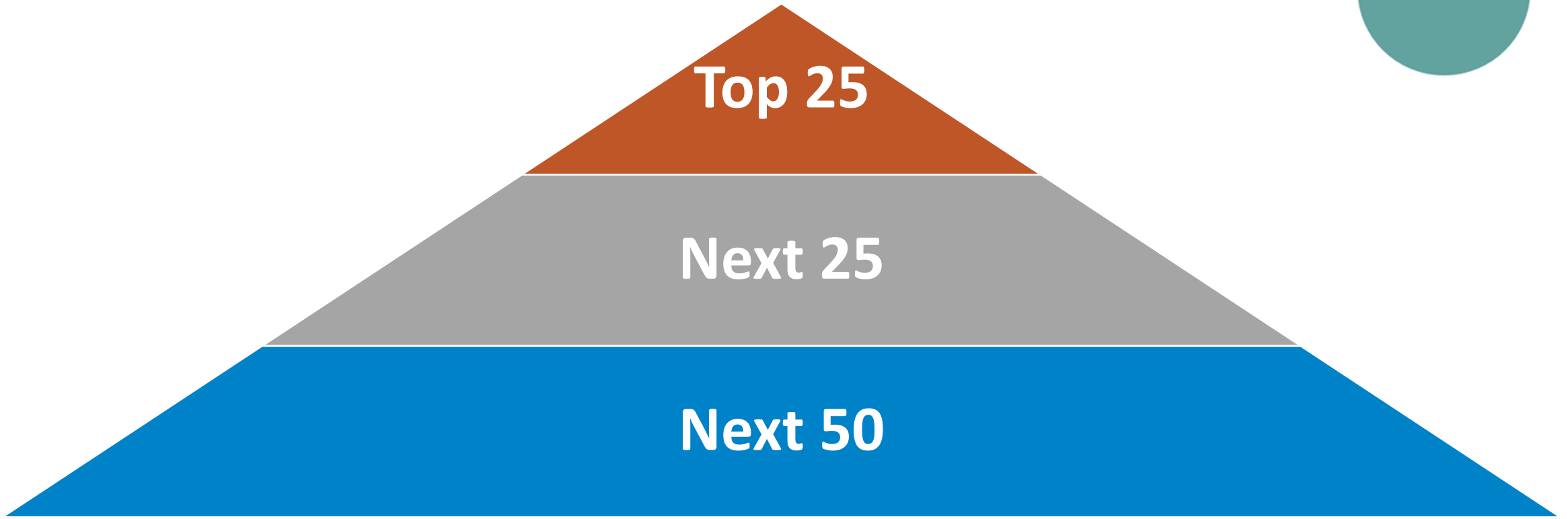
98% say charities never or hardly ever pay them a visit without asking for money.

93% of donors say that *personal contact* influences future giving.

Cultivate



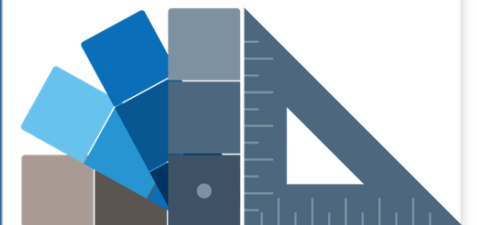
# Major Giving: Evaluating Top Potential Donors





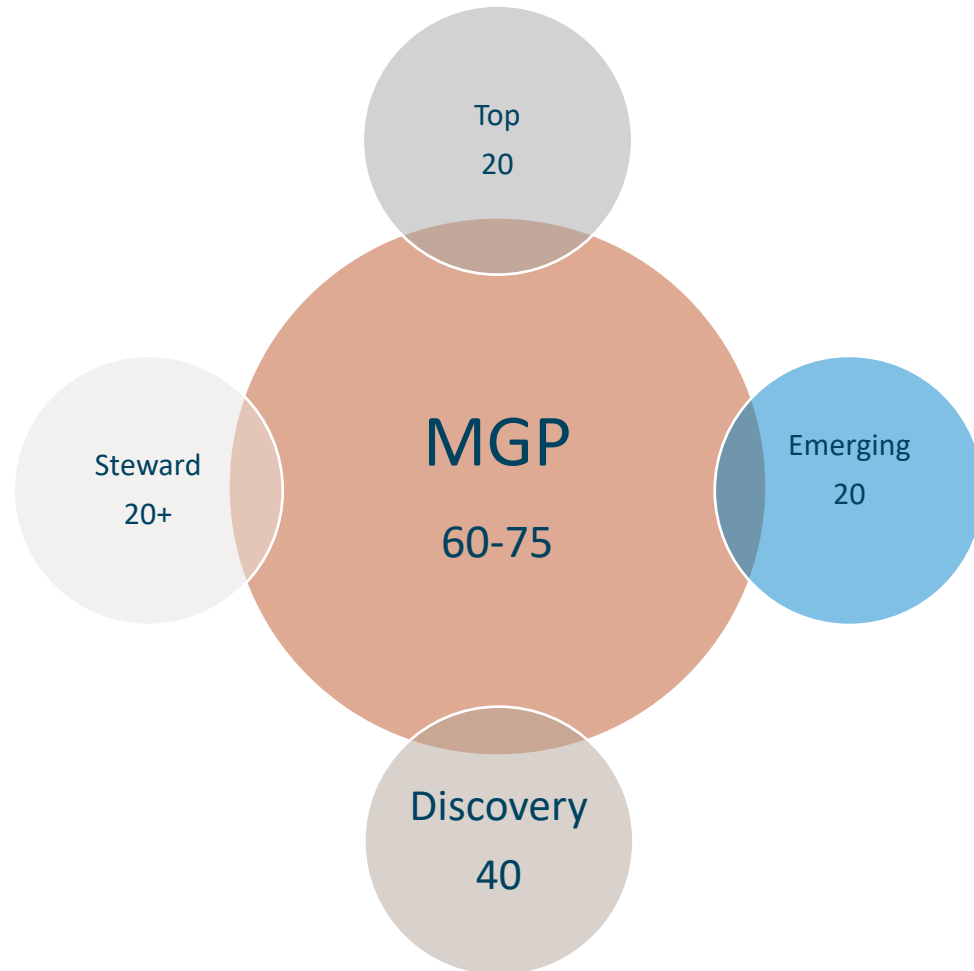
# Moves Management: Prioritizing Grid

ABILITY →	1	2	3
AFFINITY ↓			
3	3 – love you but can't give	6 – love you and might give	9 – love you and can give
2	2 – like you but can't give	4 – like you and might give	6 – like you and can give
1	1 – know you but can't give	2 – know you and might give	3 – know you and can give





# Managing MG Portfolio



## Top

*Solicit next 12-18 mos.*

## Emerging

*Move to Top in 12-18 mos.*

## Discovery

*Move to Emerging in 6 mos.*

## Stewardship

*Gift; Move to Emerging*





# MG Donor Cultivation

Cultivate

1. Reconsider your perspective on fundraising
2. Build philanthropy by connecting with donors in a major gifts program
3. Develop donor cultivation that works

**Strategic**

**Designed**

**Purposeful**



# Remember **Why** People Give

91% want to see an organization's sound business and operational practices

87% have more confidence in nonprofit organizations to solve societal problems

15% are motivated by income tax deductions

Final Evaluation

78% connect their giving to causes they care about most deeply

71% rely on communication from the nonprofit to understand impact

58% said they gave because of their belief in the organization's mission

*2020 Bank of America Study of Philanthropy: Charitable Giving by Affluent Households*

*\*Poll of Americans an annual household income greater than \$200,000 and/or net worth greater than \$1,000,000*



# The 5 “Rights” of the Art of the Ask

Solicit



**Right Person:** who is asking whom; who talks; who asks



**Right Time:** are they ready to be asked; cultivation – education – awareness



**Right Place:** make it a comfortable atmosphere for the donor



**Right Amount:** research and consult to determine range



**Right Project:** is the donor interested, knowledgeable and invested





# Components of the Asking Process

***Asking is 90% preparation.***

1. Making the appointment
2. Materials preparation & usage
3. Making plans before the appointment
4. Making the ask
5. Responding
6. Following up



"We need to strike the right tone between asking and *desperately pleading* in our alumni solicitation letters."



# Suggested Ask Language

Solicit

- “What would it take for you to consider a gift of XXX...”
- “The reason I gave to this campaign is...”
- “Like you, I give to something I believe in... This is worth your investment...”
- “Your stretch gift will enable us to reach our vision to...”
- “This is a multi-year campaign, so you can stretch your pledge out over the next 3 years and take care of your annual support as well...”
- “We’d like you to consider a naming opportunity of...”
- “Would you consider a \$100,000 gift spread over five years, or \$20,000 each year...”
- “I hope you’ll join me at the lead gift level ...”



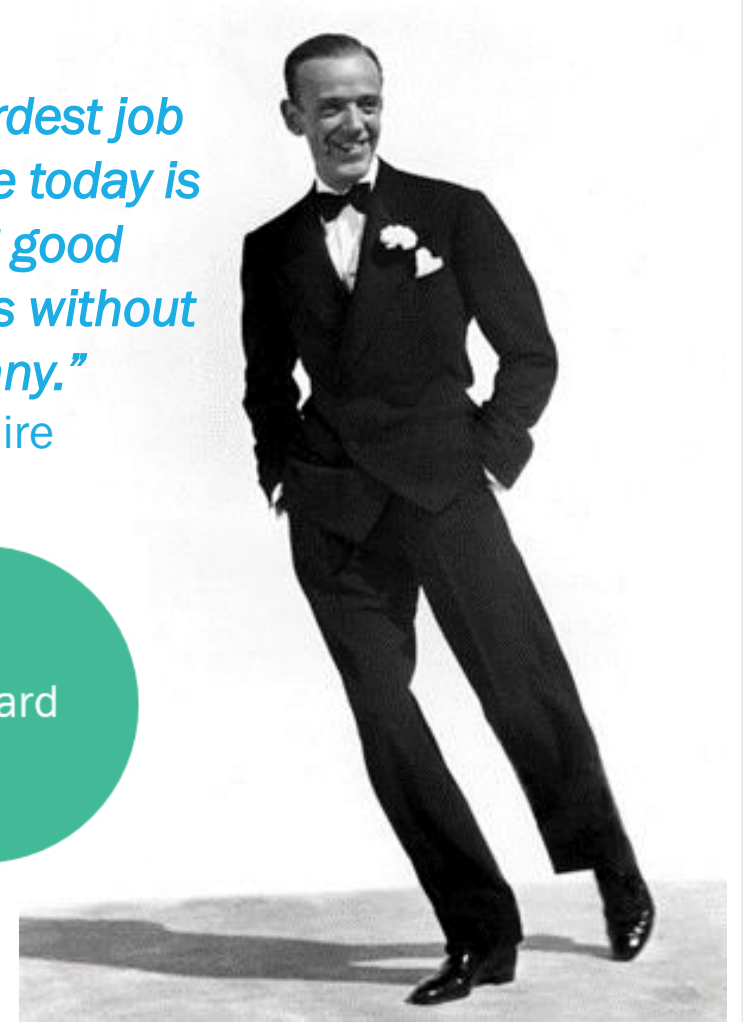
Workshop Workbook: pg. 25-26



# Cultivating & Stewarding: Manners Matter

- Please = **Cultivation**; Thank You = **Stewardship**
- Let the donor teach you
- Pick up on their manners
- Mimic their communication style
- Listen and learn
- Consider personal abilities in hiring staff
- Polite email communications
- Ask supporters what they like to do, plan events they will like
- Consider thoughtful, creative thank-yous
- Donors want to see your: energy, enthusiasm, empathy!

*“The hardest job kids face today is learning good manners without seeing any.”*  
Fred Astaire





# Example: Impact Statement



An Impact  
Report for  
The XXX Family

## Share a Personal Impact Report with Major Donors

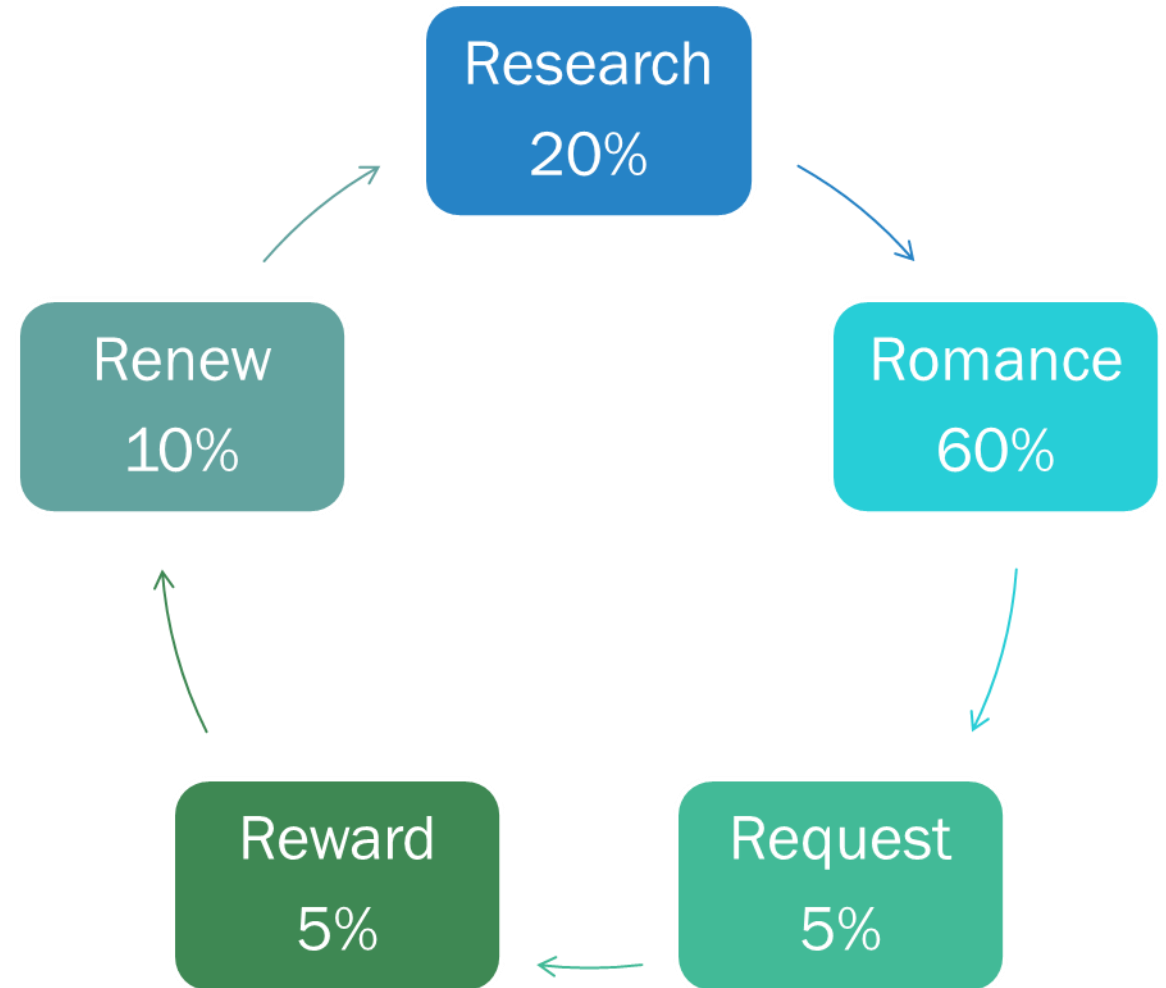
Example from UNCSA includes:

- Photos
- Personal letter
- Scholarship recipients; profile
- Endowment/funds; testimonials
- Narrative descriptions of impacts
- Total of AF giving + other gifts



# Consider the Donor's Perspective

Time  
Allocation in  
the Donor  
Relation's Cycle





# Stewardship Reflects the Value of Donor Retention

- Prompt, personal and powerful thank you letters
- Consistent communications
- Donor recognition
- Trust & donor loyalty are earned



## TIP:

- [How to engage and retain DAF donors](#) (*NonProfitPRO, 1/23/24*)

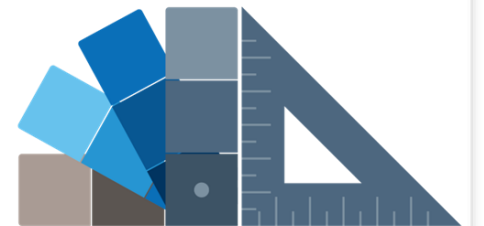
🌟 More on **stewardship** in the last session today 🌟



# Another Tool for Donor Relations: Journey Mapping

**Definition:** a visualization of the process that a person goes through in order to accomplish a goal

1. compile a series of user actions into a **timeline**
2. flesh out timeline with user thoughts and emotions in order to create a **narrative**
3. narrative is condensed and polished, ultimately leading to a **visualization**





# Journey Map Example: Donor Relations

Turn the donor pyramid upside down to visualize the donor journey:

- Traditional Donor Pyramid Process



- Donor Funnel



Workshop Workbook: pg. 27





# Journey Mapping the Donor Experience

	Engagement	Participation	First-time Gift	Loyal Donor	Major Gifts	Principal Gifts
<b>Current State</b> Unaware of opportunity	Unaware → initial connection	Action taken → grow size of community	1 gift → stewardship	Move from 1 <sup>st</sup> time to multiple-time donor	Authenticity influences regularity/size of gifts	Need to learn about add'l giving opps.
<b>Ideal Future State</b> Consideration of opportunity	Storytelling impacts and empowers engagement	Action taken → tell own story = more resonant	1 gift → <u>loyal</u> donor; build trust	Committed to organization; personalized comm.	Authentic relationship; growing gifts; influence peers	Legacy of philanthropy to org.

- Doing?
- Thinking?
- Feeling?



# CLOSING



The Art & Science  
of Creating Campaigns

3:30 – 4:00

MAJOR THEMES &  
TAKEAWAYS

CLARE



# 2022 AFP Confidence Survey

Measured  
fundraisers'  
confidence  
levels

-

Scale of 1-10

Fundraisers are more optimistic now  
since the pandemic began

Prioritized 11 areas (for Q1):

1. Donor retention (62%)
2. Major giving (54.5%)

Both require good **cultivation & stewardship**



## Key Themes & Top Trends Cited Today:

Shift focus to  
major giving

Prioritizing  
donor  
relations

Donor  
retention

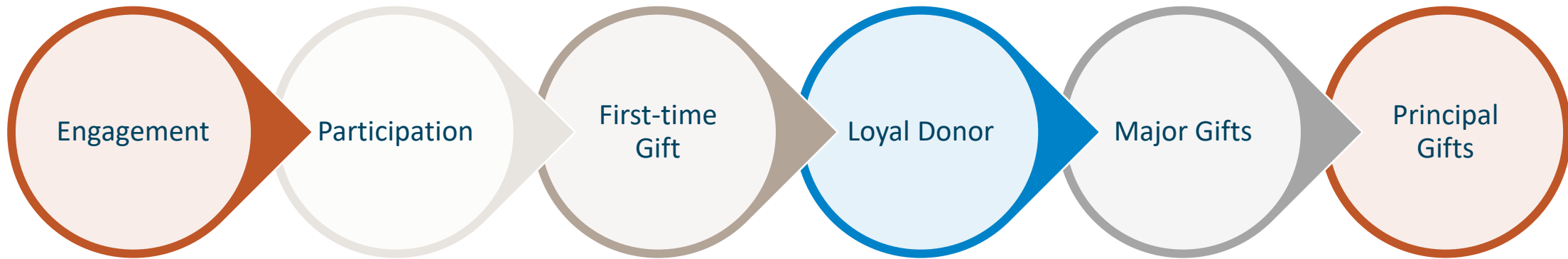
Value of data  
analytics

Stewardship

High Tech –  
High Touch



# MG & Donor Relations Along the Journey Map

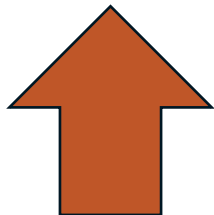


Think of the Donor Experience as Your Top Priority



# Make Stewardship Efforts = Solicitation Efforts

- Pay more attention to **nurturing relationship** than asking for the gift
- Create a **journey map** for your major donors
- **Engage board** members and others in donor relationships
- Measure **stewardship results** & tweak your **stewardship plan** accordingly



$$\text{Return on Investment (ROI)} = \frac{\text{Net Return}}{\text{Cost of Investment}}$$

*Better Stewardship Yields  
Better ROI*

from a CapDev post by CEO, Allan Burrows



# Paying Attention to Donor Retention Matters

Why we focus on donor retention & stewardship:



*Build Donor Retention for the Tough Times Ahead*, 10/2022

*11 Best Practices for Building an Effective Nonprofit Donations Page* 9/21/23



# Calculate the Value of Improved Donor Retention

Original Retention Rate: 41%				Improved Retention Rate: 51%			
YEAR	DONORS	AVG. GIFT*	TOTAL	YEAR	DONORS	AVG. GIFT*	TOTAL
Start	5,000	\$ 200.00		Start	5,000	\$ 200.00	
2	2,050	\$ 220.00	\$ 451,000	2	2,550	\$ 220.00	\$ 561,000
3	841	\$ 242.00	\$ 203,401	3	1,301	\$ 242.00	\$ 314,721
4	345	\$ 266.20	\$ 91,734	4	663	\$ 266.20	\$ 176,558
5	141	\$ 292.82	\$ 41,372	5	338	\$ 292.82	\$ 99,049
6	58	\$ 322.10	\$ 18,659	6	173	\$ 322.10	\$ 55,567
7	24	\$ 354.31	\$ 8,415	7	88	\$ 354.31	\$ 31,173
8	10	\$ 389.74	\$ 3,795	8	45	\$ 389.74	\$ 17,488
9	4	\$ 428.72	\$ 1,712	9	23	\$ 428.72	\$ 9,811
10	2	\$ 471.59	\$ 772	10	12	\$ 471.59	\$ 5,504
11	—	—	—	11	6	\$ 518.75	\$ 3,088
12	—	—	—	12	3	\$ 570.62	\$ 1,732
13	—	—	—	13	2	\$ 627.69	\$ 972
14				14	1	\$ 690.45	\$ 545

Grand Total from Original Donors: **\$ 820, 859**

Grand Total from Original Donors: **\$ 1,277,208**

**Total Difference: \$ 456,349**

Just a small change in your donor retention rate can cost your organization thousands of dollars!

Note: Some numbers rounded







# Communications: Framing Your Stewardship Message

## Stewardship: *Underused Strategy to Keep Donors Close*

- Consistent communications on impact: “**Gratitude Report**”
- **Concise messages** *without an ask*
- **Share stories:**
  - Email a photo and quick story
  - Text a video
  - Mail a postcard with hand-written note
  - Welcome personal visits
- Tailor multi-channel communications according to **donor preferences**



# 13 Top Secrets of Donor Thank You Letters

## Are you making a **BIG** mistake?

The #1 reason donors don't give again is they aren't *properly* thanked!

- 70% of donors would give again if they got what they need from you
- Throw out your TY letter!
- Write a great opening line
- Tell a short story
- Add a personal note

### TYPICAL THANK YOU LETTER TEMPLATE

Dear [donor name],

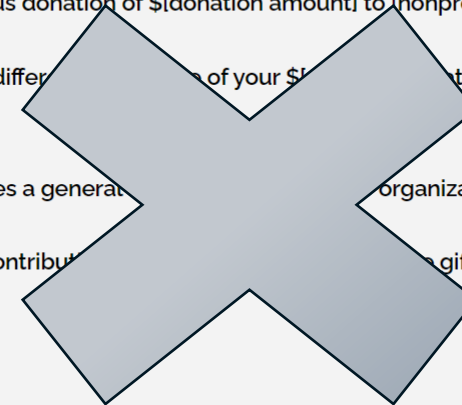
Thank you for your generous donation of \$[donation amount] to [nonprofit name].

Your donation is making a difference. Because of your \$[donation amount] contribution, we are able to [impact of donation].

[this paragraph usually gives a general idea of what your organization does]

Thank you again for your contribution. It is the gifts of donors like you to make a difference.

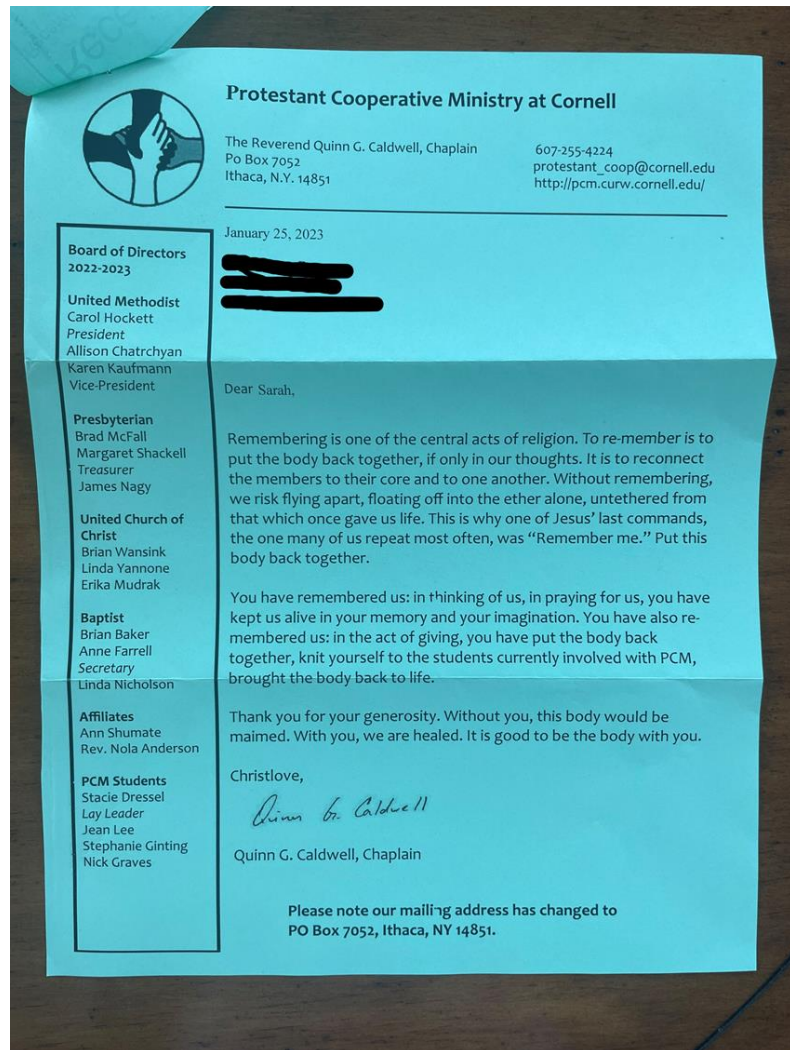
Sincerely,  
[name and title]



- Don't use "Thank you" and \$...
- Focus on the outcome that the gift makes possible
- Show the love!



# Example: A Really Good Thank-You Letter



It is more about the DONOR  
than the DOLLARS

3 Reasons to like this letter:

- Prompt
- Personal
- Powerful



# What Do Supporters Want to See From You?

Show donors the impact of their giving!

A recent study of people who donate regularly found:

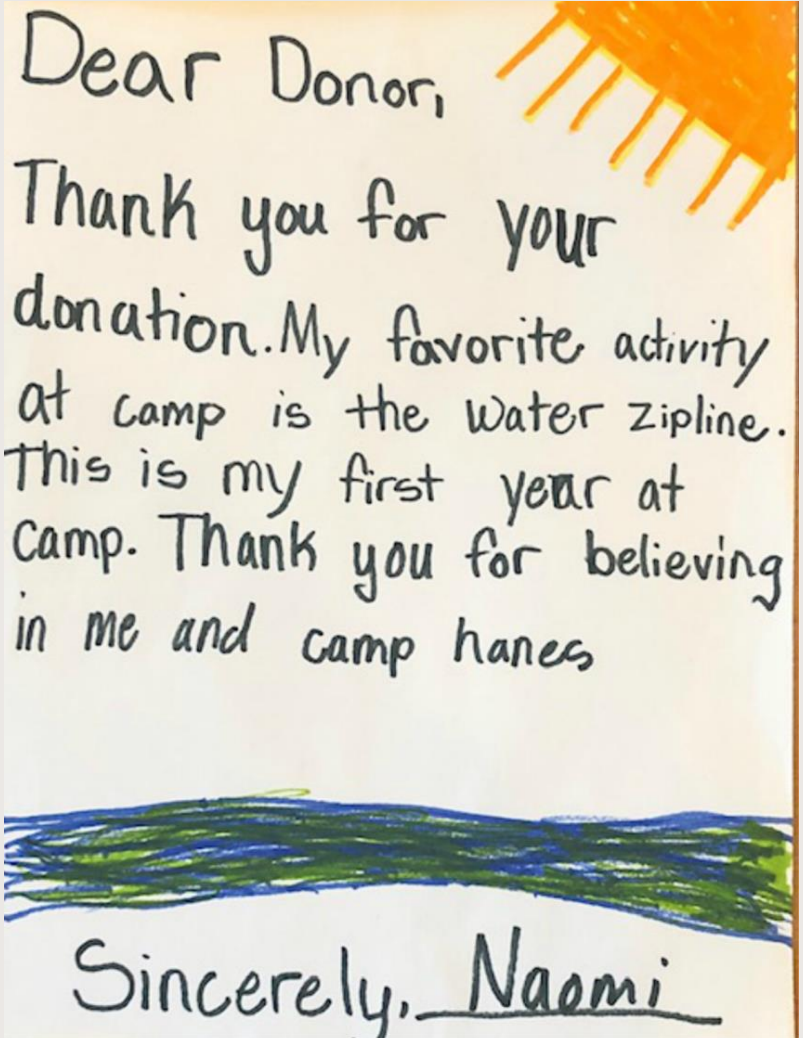
- 75% seek information about your **impact**
- 63% try to find **information on issues** you address
- 56% want a list of **specific projects** you support

*Lesson: Consistently and strategically send **information donors want!***

★ **TIP:** Annual “spring cleaning” stewardship review



# Stewardship Done Well: 3 Touches



Dear Donor,  
Thank you for your  
donation. My favorite activity  
at camp is the water zipline.  
This is my first year at  
camp. Thank you for believing  
in me and camp hanes

Sincerely, Naomi

- Acknowledge – 3 touches
  - Thank-you letter
  - Personal notes from solicitor
  - Call from board member
  - Thank-you video
  - Ask the donor how they would like to be thanked
- Appreciate – Clearly describe the value of the gift  
Where did the money go? What did it do? What impact did it have?
- Again...Again...Again...
  - Thank repeatedly and creatively
  - Engage donors throughout the year

***Stewardship is done through timely actions that invoke feelings and encourage donor involvement.***



# 10 Ways to Tell Donors They Made a Difference

1. Children's Art
2. Photo Book
3. Site Visit Video
4. Timely Mailed Gift
5. Video Testimonial
6. Handwritten Card
7. Call and/or Email
8. Face-to-Face Meeting
9. Personalized Gift
10. Memorialize the Gift





# More Creative Ways to Say Thank You



- Write a personal note; not a form thank you
- Share recent progress, however small or big
- Invite to a stewardship event that does not require a donation or make an overt ask
- Visit a donor just to say thank you
- Flowers, plant, book, chocolate...
- Board member thank you calls
- Send photos from events
- Give something made by the organization



## Create a Board Stewardship Committee or Appointee

- Good stewardship is the antidote to poor retention rates
- Create a board-level **Stewardship Committee** charged with thanking donors
- Research shows that **increasing the donor retention rate** by 10% increases the value of the donor base by at least 50% (and up to 200%)
- Having a board member **call a first-time donor within 48 hours** of them making a gift:
  - Increases donation amounts by 40%
  - Increases likelihood of a 2<sup>nd</sup> gift by 33%
- ***Thankers become Ambassadors***





# Good Stewardship Inspires Annual Giving

Use good stewardship to inspire (and retain!) annual donors & build sustainability:

- Segment and organize donors by giving tiers to **focus stewarding on high-value prospects**
- Create, utilize and regularly update a **stewardship matrix**
- Leverage **multi-channel outreach**, including: email, direct mail, social media, phone calls and visits
- Go beyond monetary appeals to **build relationships** with: engaging event opportunities, impact reports, stories, volunteer program opportunities, donor appreciation, etc.



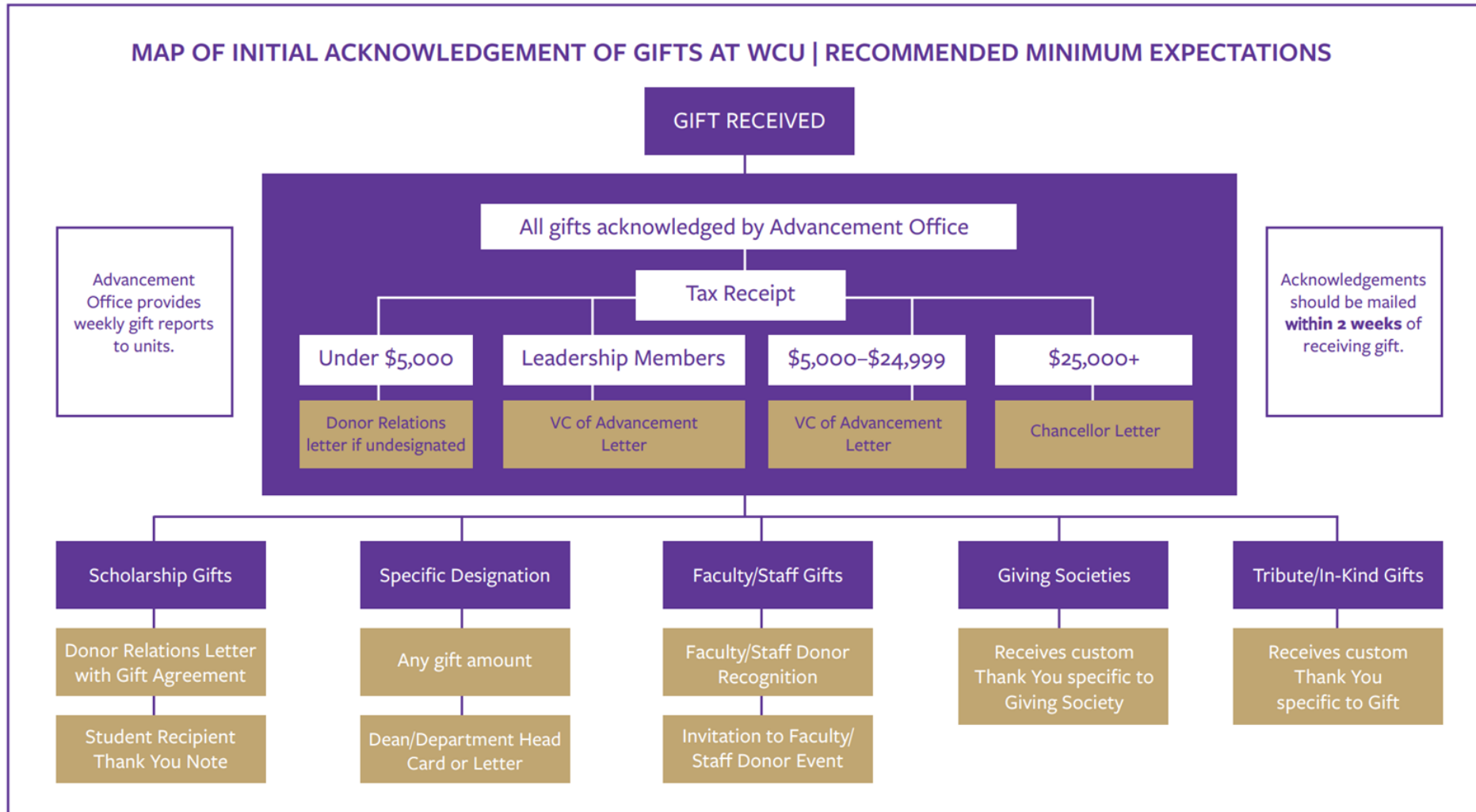
# Create an Annual Donor Engagement Plan

## **Top Tips from Create a Smart Annual Outreach Plan to Keep Donors Close — and Boost Giving, *Chronicle of Philanthropy* 1/23/24:**

1. Define your goals and tie them to your nonprofit's strategic priorities
2. Build the foundation
3. Plan consistent messages and stick to your theme
4. Ask your donors what they want
5. Create useful content
6. Use email automation to stay in touch more frequently
7. Offer opportunities to gather and learn in person
8. Build up to the year's end



# Example: WCU's "How We Thank"





# Example: Stewardship Matrix

		Donor Type	Gift Amount	Acknowledgement Letter	New Donor Welcome Packet	Print Newsletter	Personal Email	Small Gift (Calendar, Magnet, etc.)	Major Donor Event	Phone Call from BOD	Quarterly Major Donor Special Newsletter	E.D. Handwritten Card or Call	Stewardship Trip	Special Invite
Monthly	Up to 9	X	X	X										
One-time	up to 99													
Monthly	10 - 29	X	X	X	X									
One-time	100 - 299													
Monthly	30 - 49	X	X	X	X									
One-time	300 - 499													
Monthly	50 - 99	X	X	X	X	X	X							
One-time	500 - 999							X						
Monthly	100 - 199	X	X	X	X	X	X	X	X					
One-time	1,000 - 2,499													
Monthly	200 - 399	X	X	X	X	X	X	X	X	X				
One-time	2,500 - 4,999													
Monthly	400 & up	X	X	X	X	X	X	X	X	X	X		X	
One-time	5,000 & up													
<b>Bequest</b>			X	X			X	X	X	X				



# Takeaways

- How do you get started?
- How to keep momentum in a long-term campaign process?
- 3 things you could do now
- Ideas to take back & share
- Hold a de-briefing meeting



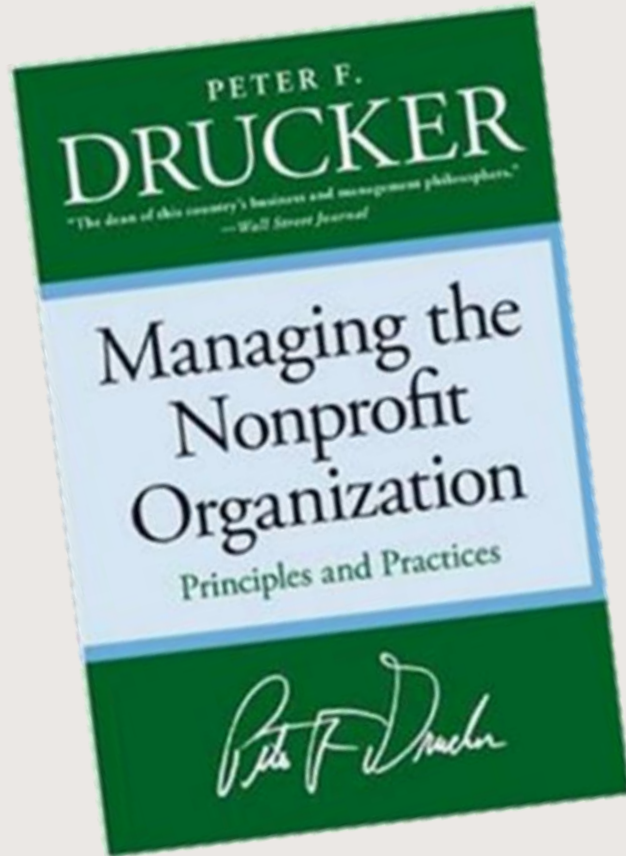
" What did you take away from the meeting ? "



# Resources & Advice



# Resources for Nonprofit Development



- Peter Drucker, “Father of Nonprofit Management”
- [Board Source](#)
- NC Center for Nonprofits, TogetherSC, VFRI
- Association of Fundraising Professionals (AFP)
- Giving USA
- Philanthropy.com
- Foundation Center + GuideStar = [Candid](#).

*“Management is doing things right;  
leadership is doing the right things.”*

Peter F. Drucker, *Essential Drucker: Management, the Individual and Society*



# CapDev “BE-Attitudes”

BE yourself | the person donors WANT to see

BE vibrant | physically and mentally

BE informed | read relevant media/books

BE healthy | drink water, walk, drive with care, exercise, have a spiritual life, sleep

BE positive | no worries, good friends, keep in touch

BE relaxed | don't take yourself too seriously

LOVE life & your work | set goals, do your best; and if it's not fun, find something else





**Thank you**

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Q&A and Discussion