



PRESENTATION TO

NCICU

Essential Components of Successful
Philanthropy



About Us

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.

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.

Download today's slides:



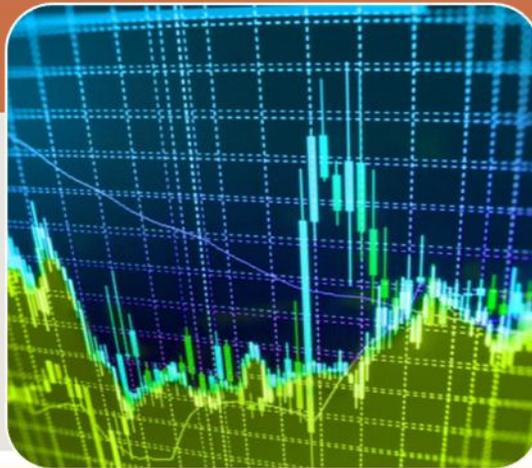


1st Things 1st: Building Toward Philanthropy

Visioning &
Strategic Planning



Financial Planning



Consensus
Building



Critical Element



Know the 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”



Framing the Essential Tools of Philanthropy



building a
Philanthropy
TOOLKIT

- Case for Support
- Leadership
- Capacity
- Donors
 - Cultivation
 - Stewardship



#1 Strong Case for Support

Emotionally
Stimulating

Intellectually
Stimulating

Easily
Understood

Benefit
Oriented

Mission
Based

Shows
Sustainability

Timely

Compelling

Results
Oriented

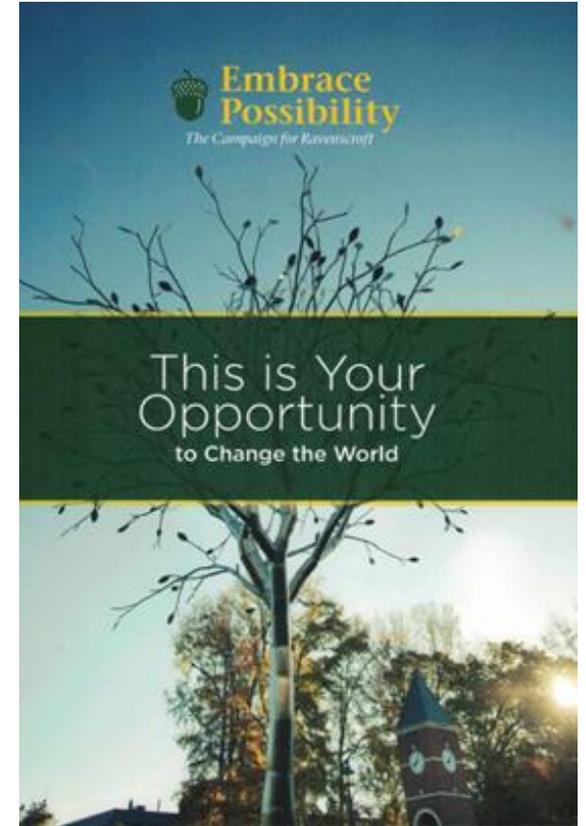


Campaign Case Examples

Thinking Big About Campaign Objectives

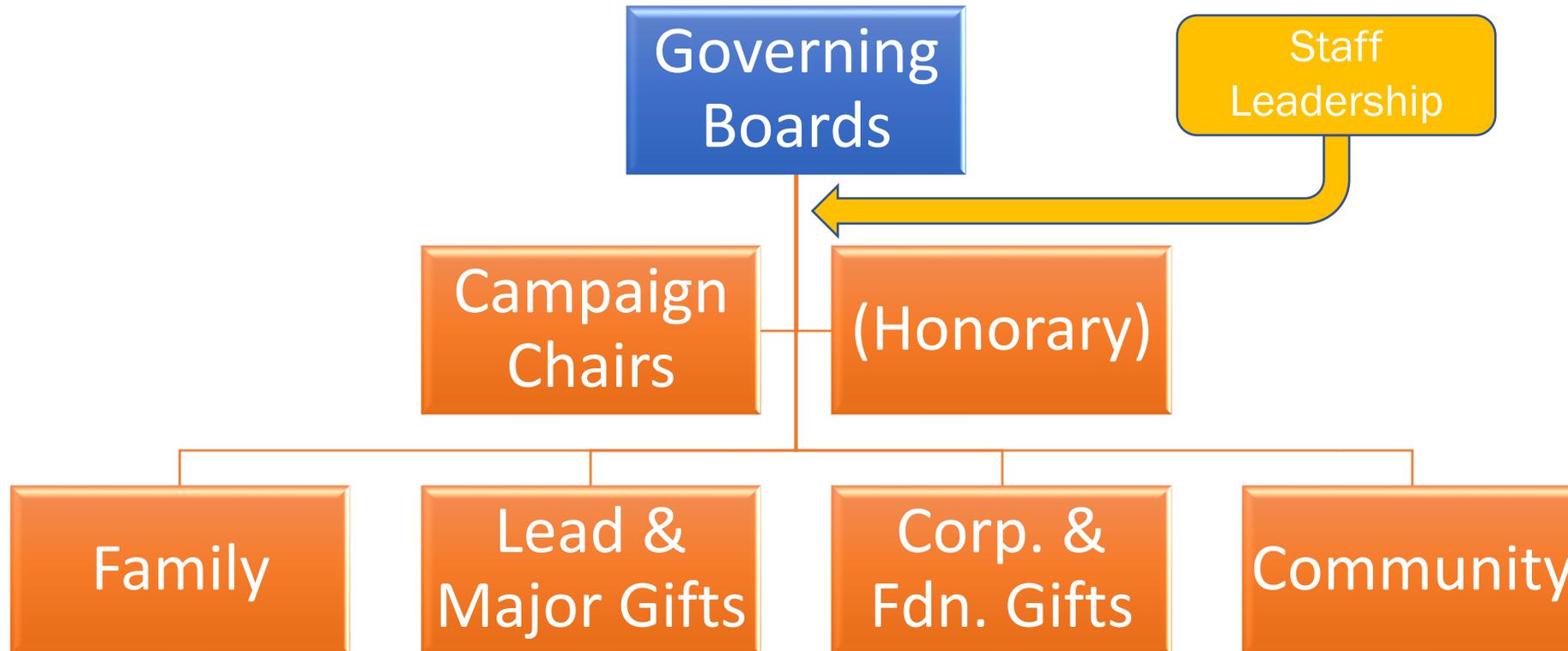
“The mind can be convinced, but the heart must be won.”

- Simon Sinek





#2 Leadership: Sample Campaign Org. Chart





Leadership Enlistment Process





#3 Elements of Internal Capacity



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.”



Campaign Budget

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

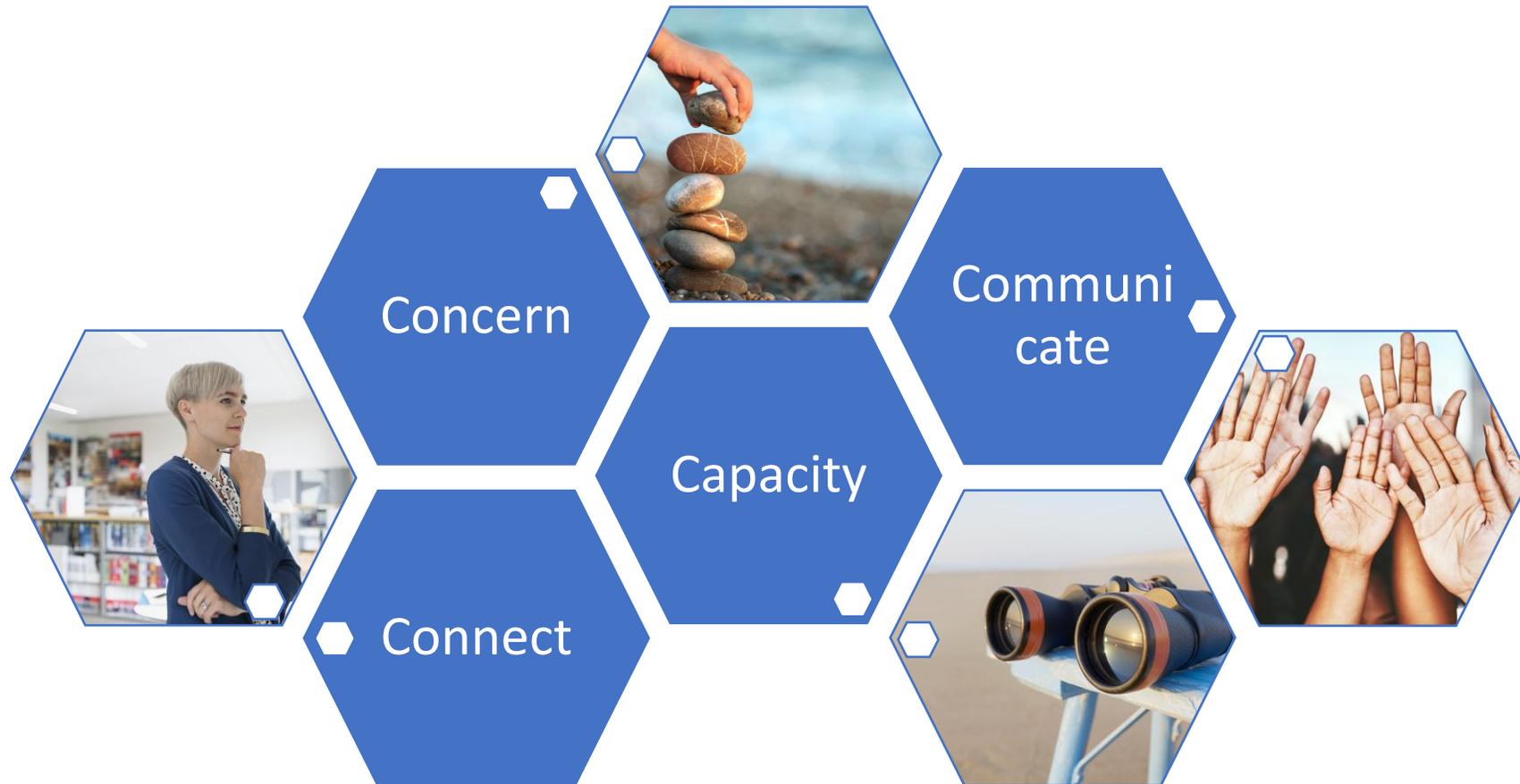
Usually 7-10% Range

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

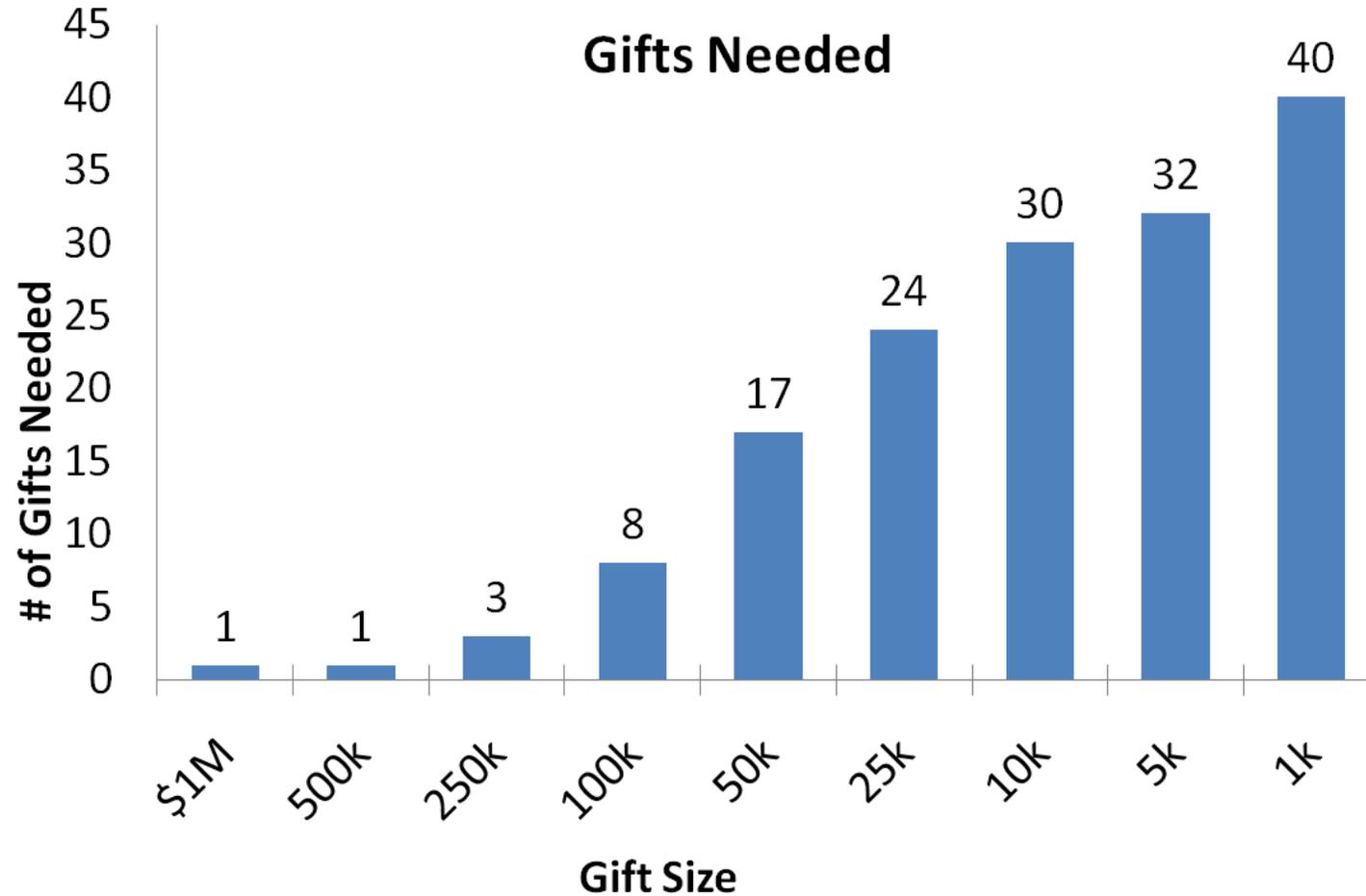


#4 Donors: Who Makes a Good Prospect?



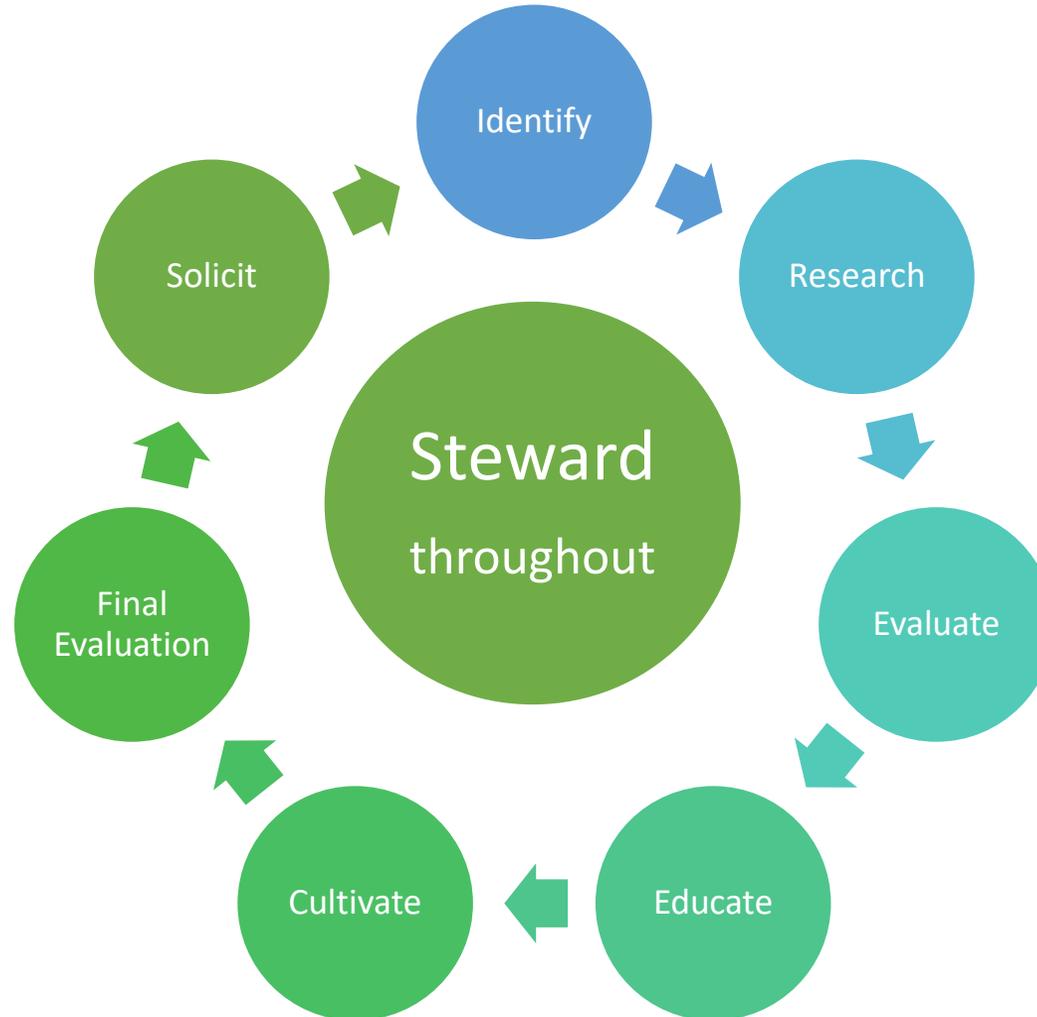


Example: \$5 Million Gift Chart





Donor Relations Cycle





It's a Continual Process



Cultivation

Strategic (not events for the sake of events)

Horizontal and vertical

More than “random acts of kindness”

Personal and communications outreach



Solicitation

Based on donor's interests and needs

Focus on relationships and values, not just \$



Stewardship

What the donor wants in a continuing relationship



Cultivation

What are your impressions when you meet someone with exceptionally good manners?



"Trust me, Mort—no electronic-communications superhighway, no matter how vast and sophisticated, will ever replace the art of the schmooze."

• •



Cultivation Process: the Romance Analogy

You could think of:

- Matchmaking
- First Date
- Dating
- Engaged
- Wedding
- Happily Ever After

like this phase of cultivation:

- Donor identification
- Special event invitation
- Annual giving
- Major gifts
- Campaign gift
- Planned gift





Indicators for Identifying Best Potential Donors



Recency

Most recent gift received



Frequency

How often they give to you



Money

Lifetime dollars donated

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

TOOL: Bloomerang offers a [calculator](#) to help nonprofits visualize the impact of increasing your donor retention rate on your fundraising revenue



Cultivation is the “Art” of Fundraising



- Focus on the person; not their wallet
- “Prioritizing Money Builds Fake Relationships”
- The gift is the by-product of the relationship
- Use active listening skills
- Share your story – positive & impactful
- Maintain stewardship
- Write them, invite them, excite them!



Stewardship

What is the value of stewardship done well?



Paying Attention to Donor Retention Matters

Why we focus on donor retention & stewardship:





The Stewardship Solution

Good
stewardship
creates good
supporters

= more giving



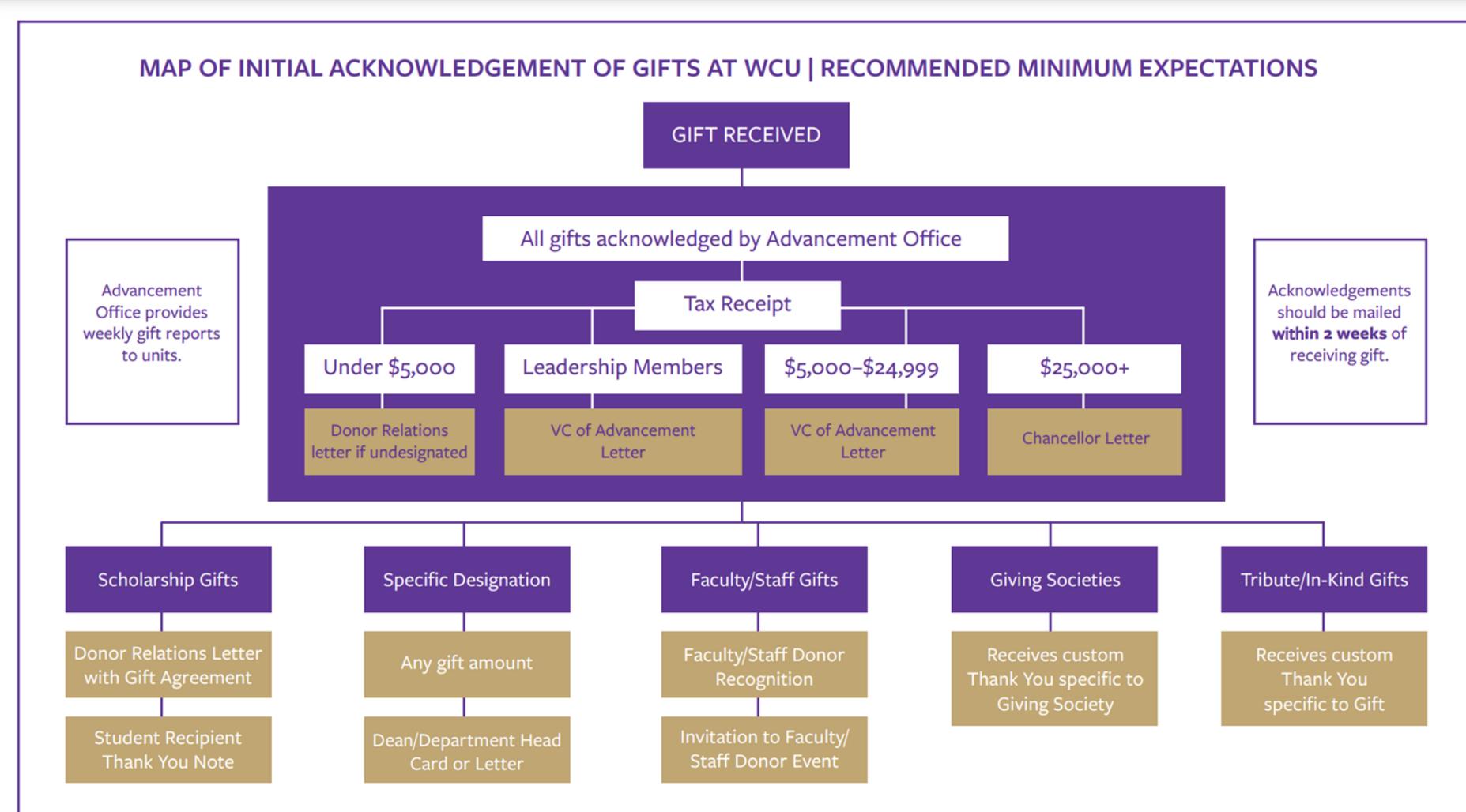


Start with How You Acknowledge Gifts

- Acknowledge gift immediately
 - Not 3 months later
 - Include organizational thank you (letter/receipt) AND **personal notes** from solicitor, executive director and/or board chair
- Transparency
 - Clearly describe to the donor the value of the gift
 - ▶ Where did my money go? What did it do?
 - Describe impact on programs, services...
 - Provide interesting annual reports
- Include photos, newsletters, testimonials in follow-up emails



Example: WCU's "How We Thank"





Where Are We Missing Opportunities

Tapping into
the potential
of your
LYBUNT list



- LYBUNTS
- SYBUNTS
- Targeted segmenting
- Invite to non-FR events
- Follow-up:
 - Phone calls
 - Offer tours
 - Meet for coffee; home visits





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!***



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



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
- **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 2nd gift by 33%
- ***Thankers become Ambassadors***



Example: Stewardship Chart

Gift Level	Up to \$1k	Up to \$5k	Up to \$10k	Up to \$25k	Up to \$50k	Up to \$75k	Up to \$100k	Up to \$150k	Up to \$300k	Up to \$500k	\$1M and up
Thank You											
Organizational thank you with personal note											
Thank you call from DOD or Executive Director											
Thank you note/call from Board Chair											
Personalized memento or creative thank you											
Recognition											
Recognition on Social Media venues											
Recognition on donor lists											
Naming Opportunity											
Donor wall											
Feature article of donor in organization's publications											
Events											
Donor Invite to celebratory event											
Donor recognition/visibility at event											
Ongoing Stewardship											
Newsletter distribution list											
Invitation to organization's events											
Personalized note with update											
Invitation to visit and tour facility											
Personal visit from DOD and/or Board Member											



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													
Bequest			X	X			X	X	X	X				



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





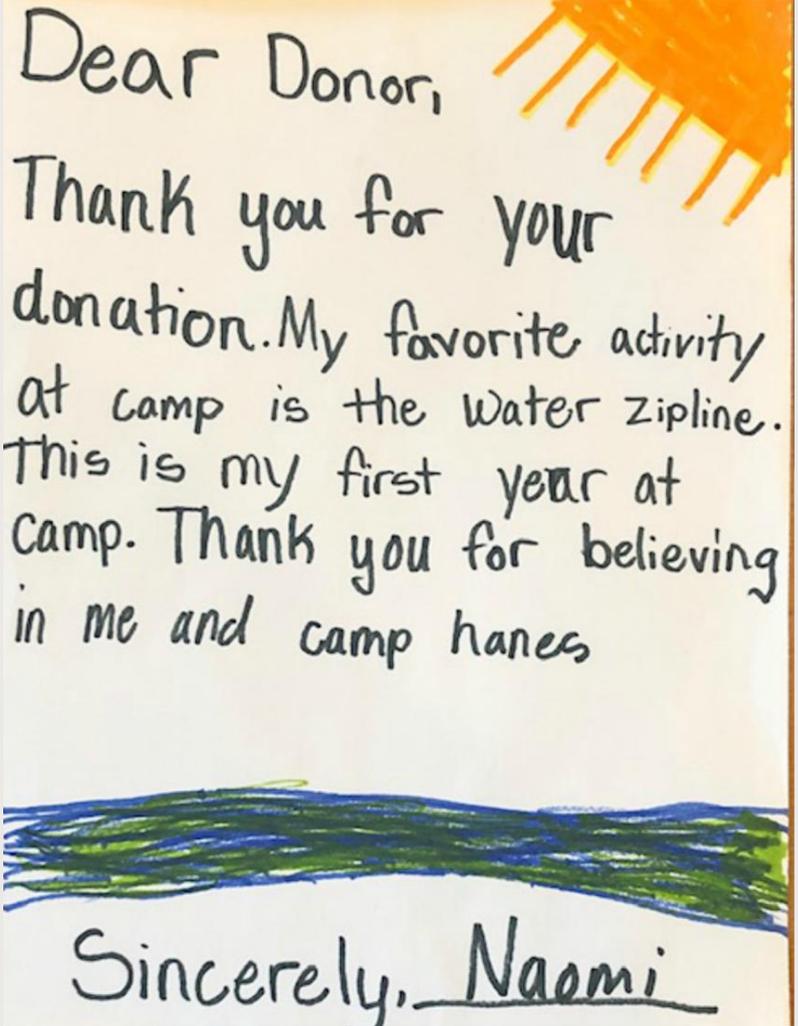
10 Ways to Tell Donors They Made a Difference

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





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
 - 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.



Prioritize Cultivation & Stewardship

Ideas for Attracting & Retaining Donors in 2026:

1. Pay more attention to stewardship than to solicitation
2. Create a journey map for major donors
3. Engage others in building the relationship
4. Measure retention results

What are your ideas?



Thank you

NCICU

Q&A and Discussion