



CapDev Workshop

The Inn at Elon | 4.16.26



Charting the Course
to Campaign with
CapDev



Serving nonprofits across the Southeast since 1984
Development Planning & Campaigns
Executive Search & Transition Planning



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.



Charting the Course to Campaign



Welcome!

Logistics

Workbook/Agenda

Introductions

Contact: cjordan@capdev.com



Introductions: Stephanie Flores de Valgaz



Name

Position

Organization

What do you want from today?



CapDev Feather in Your Cap



1. Longest distance
2. Shortest distance
3. First to register
4. First visit to Elon
5. Longest-term CapDev client
6. Current clients
7. Past clients

SETTING THE STAGE



Charting the Course
to Campaign with
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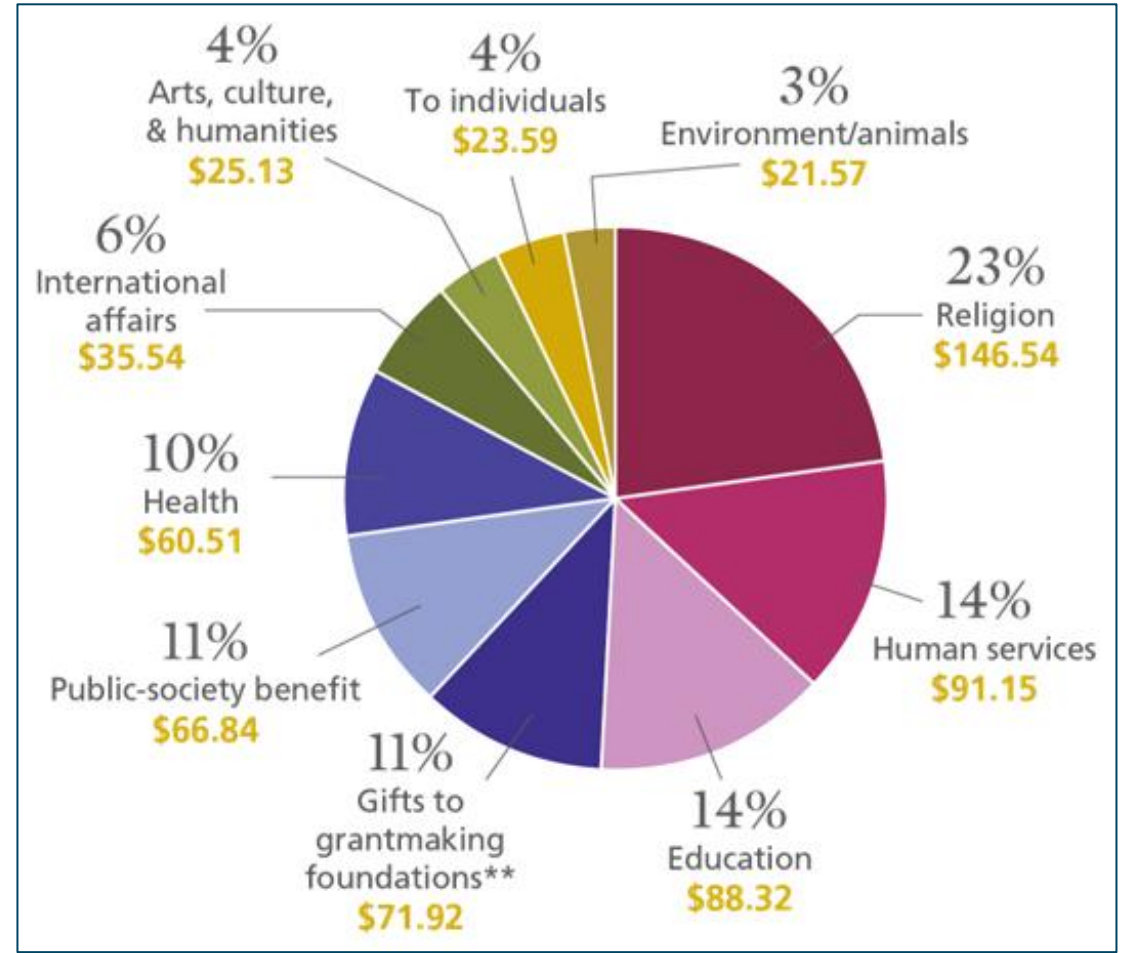
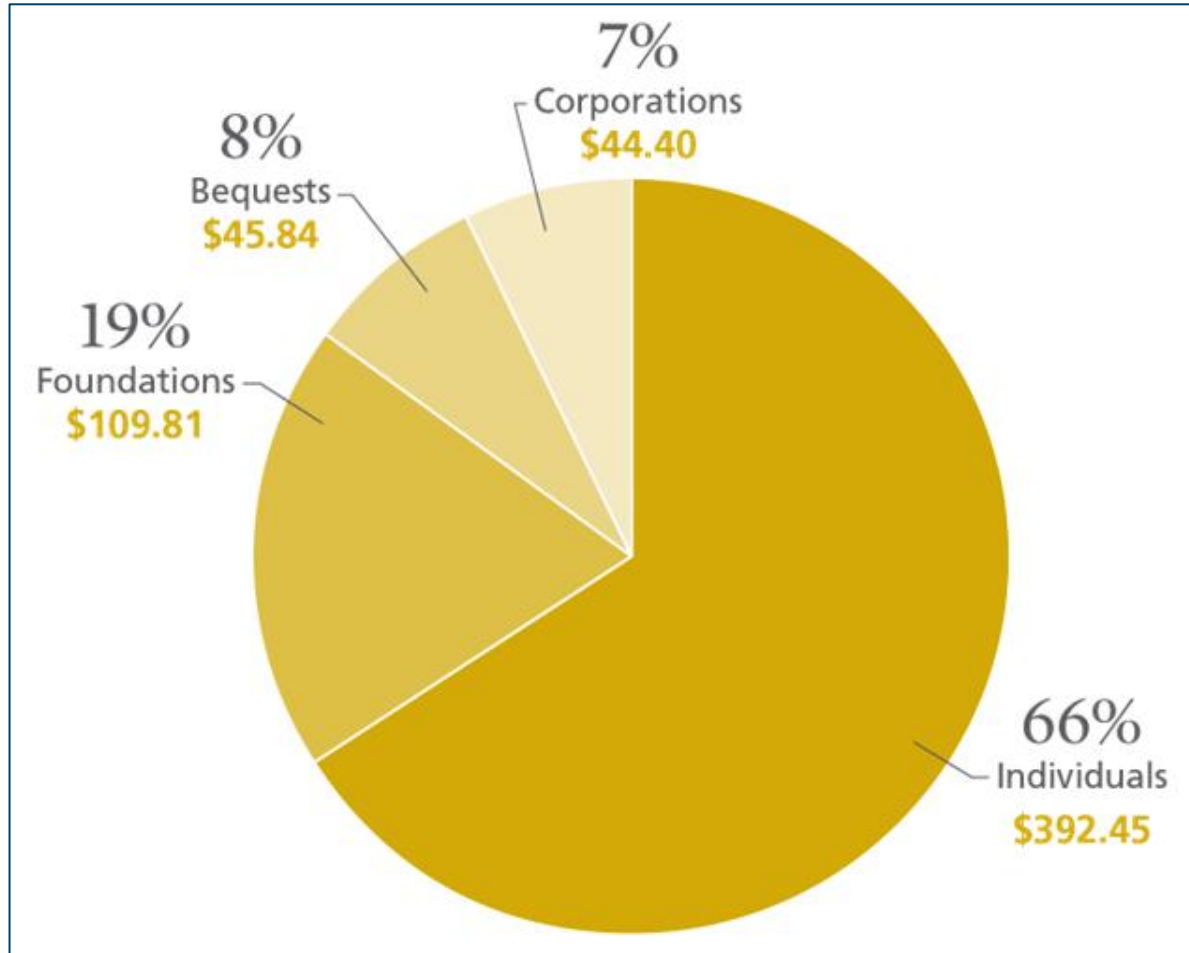
9:30 – 9:45

INTERPRETING RECENT
GIVING TRENDS

ALLAN



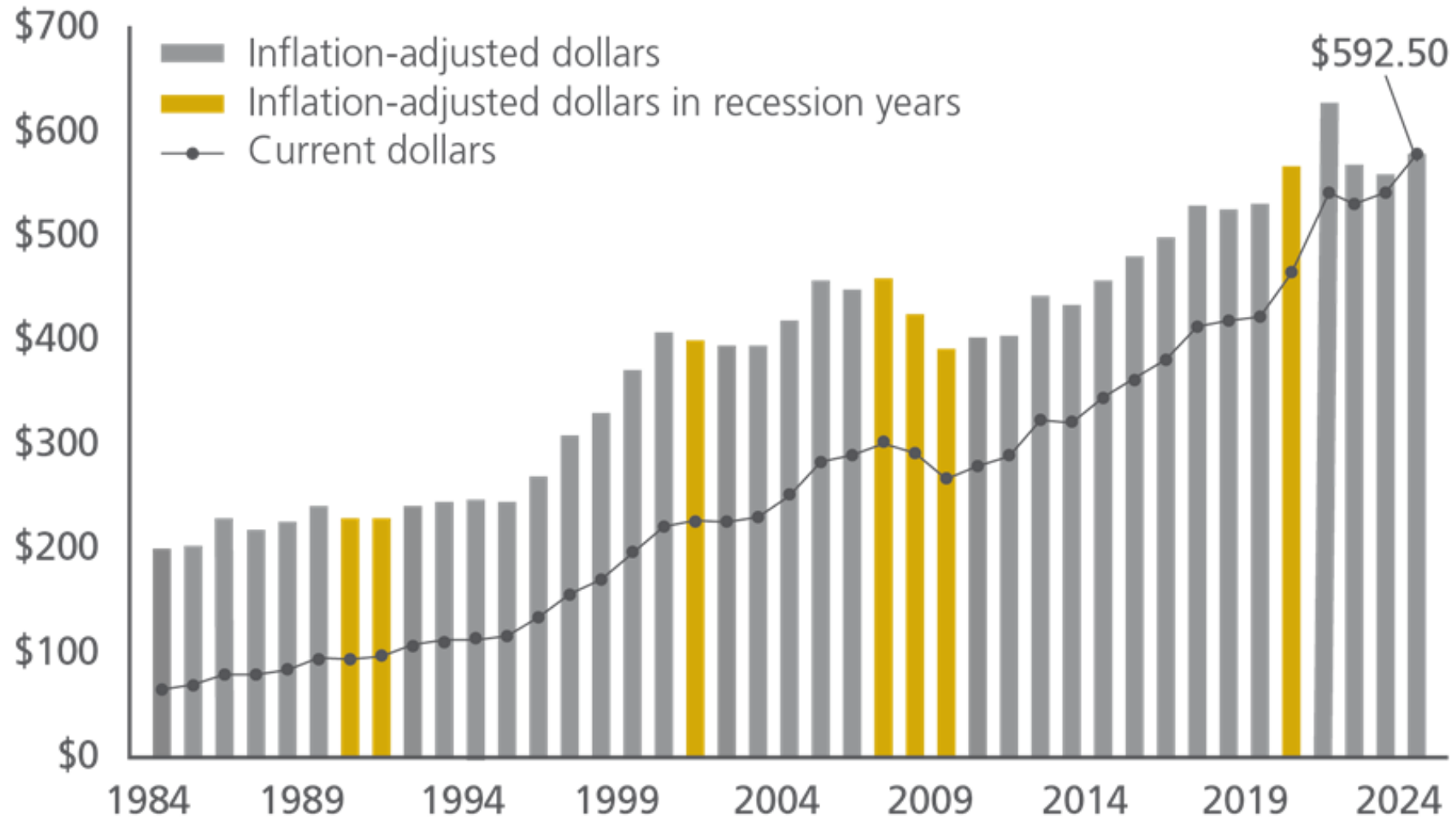
Giving Grew 6.3%: \$592.5 Billion in 2024



Source: [Giving USA](https://www.givingusa.org/)



Total Giving Over 40 Years: 1984-2024

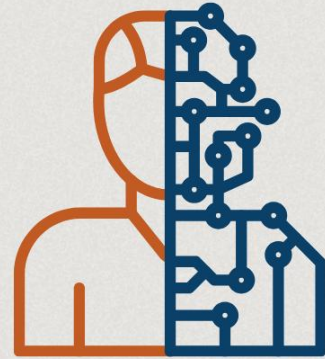




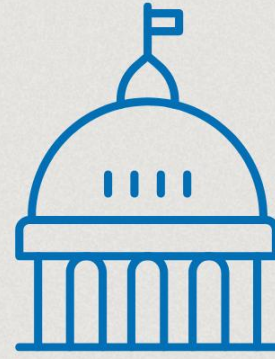
What Trends are Shaping Philanthropy in 2026?



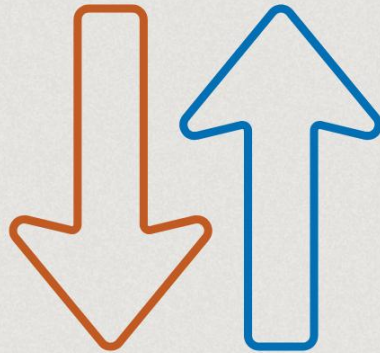
DONOR ADVISED FUNDS



AI COLLABORATION



POLICY CHANGES



DONORS AND GIFTS



NEXT GENERATION GIVING

Resources:

- ["Who are DAF Donors, and How Can Nonprofits Reach Them?"](#) National Philanthropic Trust
- ["Donor Perceptions of AI,"](#) Fidelity Charitable
- ["Adapting to Charitable Tax Changes: What Nonprofits Need to Know for 2026 and Beyond,"](#) Giving USA
- ["Donors Are Down, But Dollars Are Up,"](#) The Conversation
- ["The Next Generation of Philanthropy report,"](#) Lilly School of Philanthropy



Summary of Philanthropic Trends from 2025 BoA Study

Affluent Americans continue to lead in charitable giving

81% give

\$ are up / #s are down

More affluent Americans are **volunteering** time

43% in '24 v 30% in '20

Affluent households use a variety of **approaches** to achieve philanthropic goals

48% plan to create

Charitable giving **strategies/** decision-making are evolving

Issue-based v organization

Affluent households of **all wealth levels** are learning to navigate in different environments

\$5M net worth giving is 3x those with less than \$1M





Key Themes from BoA Study



Close to Home

79% support local communities
5 = average # of organizations supported



Joint Decisions

46% make decisions jointly with spouse or partner
Only **13%** involve grand/children



Religious Giving

39% of affluent \$ went to religion
#2 – basic needs (16%)
#3 – higher ed (14%)



Giving Tools

18% made through giving tools (up from 11%)
24% have a giving tool



Experts

Giving “experts” give more than **6x more** than giving “novices”
45% have a giving budget



LILLY FAMILY
SCHOOL OF PHILANTHROPY
Indianapolis

BANK OF AMERICA





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



What Action Steps Can I Take?

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. Integrate **DAF** messaging
10. Invest in **professional development**

CAMPAIGN READINESS

9:45 – 10:15

GAUGE YOUR READINESS

ALLAN

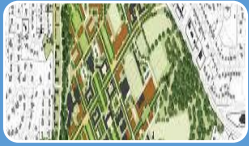


Charting the Course
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Types and Purpose of Campaigns



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”

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

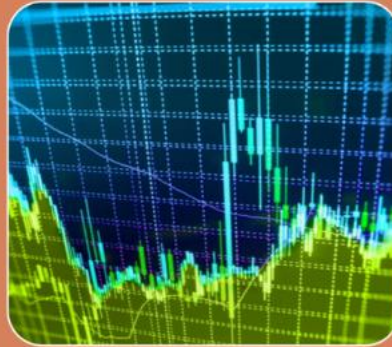


Getting Started

STRATEGIC PLANNING



FINANCIAL PLANNING



CONSENSUS BUILDING



Critical Element



Campaign Preparation

Before You Start, Ask Yourself If You Have:

- ✓ A compelling strategic vision for the organization
- ✓ A clear and well-vetted case for philanthropic support
- ✓ A thorough assessment of campaign readiness
- ✓ 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
- ✓ 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





Campaign Readiness Exercise



Workshop Workbook pg. 14



Campaign Readiness Rating

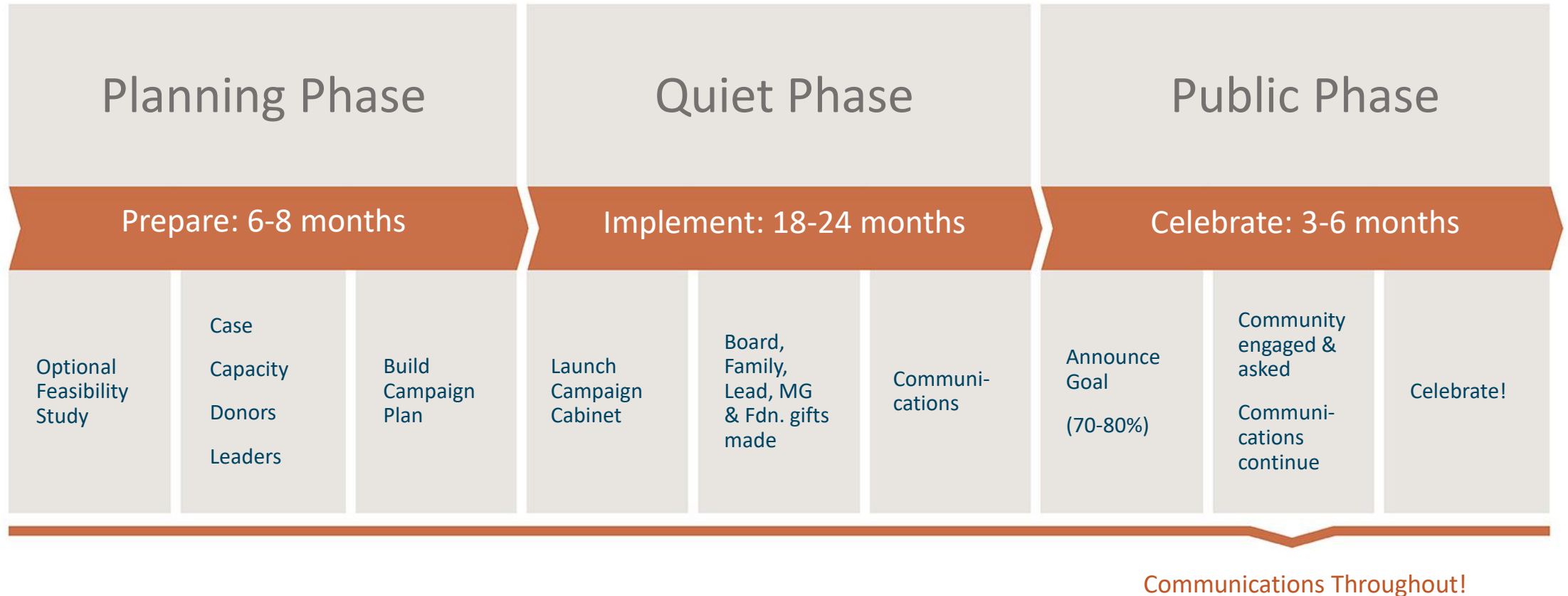
Use this checklist as a scorecard and guide to help determine what your organization needs to be ready to plan and prepare for a major campaign:

✓	Action to be Accomplished	Rating*
	ORGANIZATIONAL STRUCTURE:	
	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	
	VISION:	
	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	
	LEADERSHIP:	
	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)	
	DONORS:	
	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)	
	CAPACITY:	
	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.



Put It All Together: Sample Campaign Timeline





10:15 – 10:30 Break



START WITH WHY

10:30-11:15

BUILDING YOUR
CASE FOR SUPPORT

CLARE



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Case for Support





Building a Culture of Philanthropy

Fundraising: *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

Philanthropy: *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

Resource: [*A Shift From Fundraising to Philanthropy \(NonProfit Pro\)*](#)

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?





Ways to Structure Your Story

Consider 1st:

What do you want the recipient to:

1. Feel?
2. Know/understand?
3. Do?

Address these questions:

- **What?**
 - What happened
- **So what?**
 - Why does it matter
- **Now what?**
 - What is next



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

*"The mind can be convinced, but the heart must be won."
- Simon Sinek*



Start with 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)



Workshop Workbook: p. 18



Case Crafting Exercises



Workshop Workbook p. 20-21

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.

LEADERSHIP

11:15 - 12:00

THE KEY TO
CAMPAIGN SUCCESS

JENNIFER



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Leadership



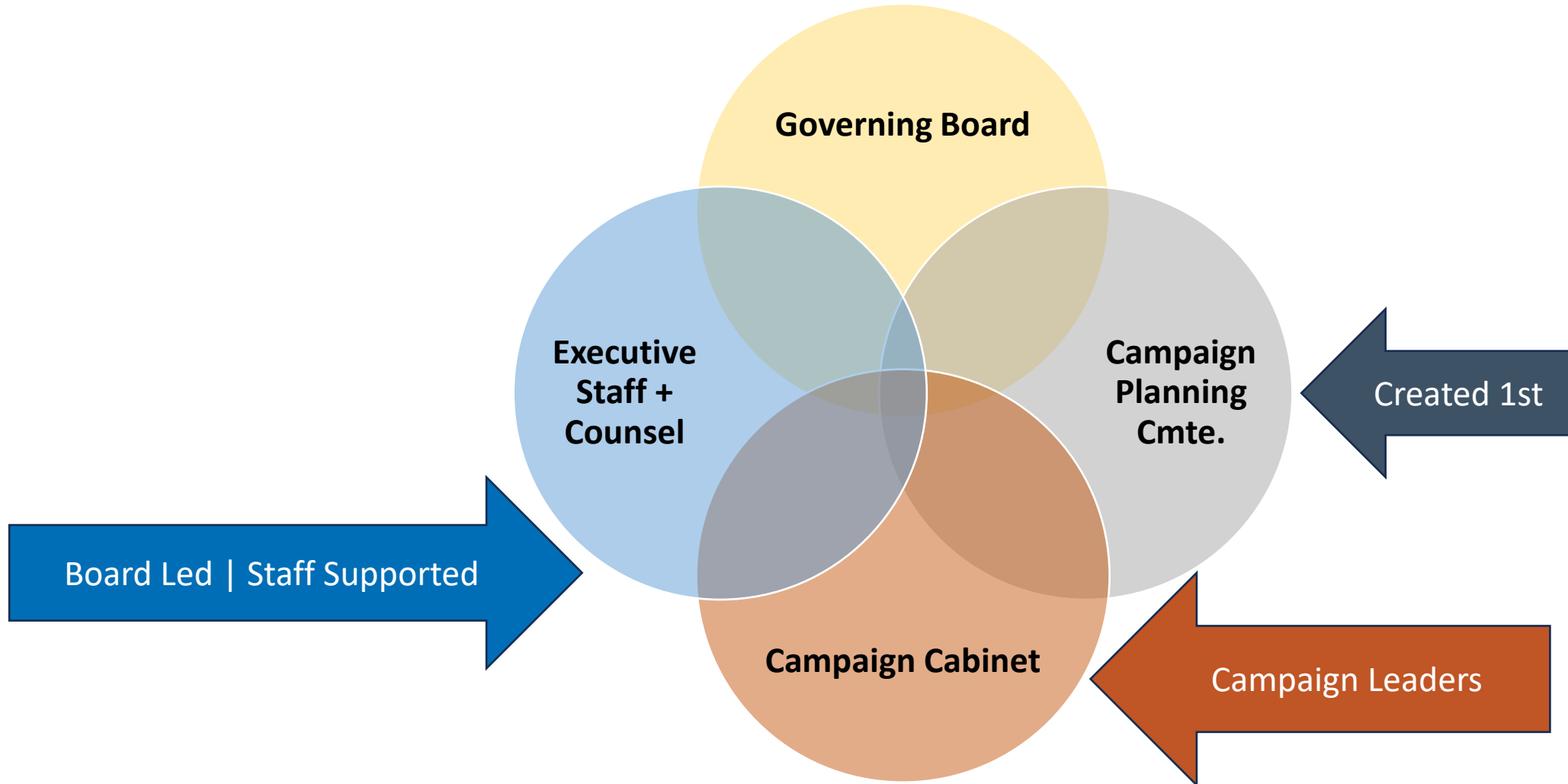


For the Board: Charting the Course to Campaign





Leadership Roles in Campaign





Campaign Work Executed by Committees

Board Exec. Committee/Task Force

Board Finance Committee

Board Construction/Facilities
Committee

Feasibility Study Committee

Campaign Planning Committee

Campaign Steering Committee

Use these volunteer opportunities to engage potential campaign donors. The more closely they're involved with the project, the stronger their sense of ownership—and the more invested they'll be in its success.



Campaign Planning Committee Roles & Responsibilities

- 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 Steering Committee** members (include Board Chair)
 7. Approval of campaign budget and campaign infrastructural changes
 8. Attend regular meetings – depending on the speed in which the quiet phase will be launched, these might be held every other week or once per month.
- Once the **Campaign Steering Committee** is created, the work of the **Campaign Planning Committee** is complete.



The Work of the Campaign Planning Committee

The **Culmination of the Campaign Planning Committee's work** will be a series of recommendations that will be presented to the board to include:

- Campaign Objectives
- A Working Campaign Goal
- Draft Campaign Budget
- Campaign Timetable: Moving from Planning Phase to Quiet Phase
- Campaign Organizational Chart
- Naming Opportunities

At this same meeting, **updates will be provided on the status of:**

- Names for Campaign Leadership
- Any Lead Gifts and/or Timeline for Board Giving
- Case for Support



Leadership Characteristics



What makes a great leader?

- Knowledge of the Mission
- Reputation/Influence
- Current/Former Board Leadership
- Fundraising Experience
- Capacity & Inclination to Make their Own Leadership Gift to the Campaign
- Strong Personal and/or Professional Networks
- Time
- Commitment



Relationship-Based Leadership Mapping Exercise

Workbook p. 23





Exercise: Relationship-Based Leadership Mapping

Identifying Potential Campaign Committee Members

1. Jot down the top 5 – 6 people who you believe can be/should be lead donors to the campaign.
2. Beside their name indicate whether you think they would consider serving on the campaign steering committee. Yes/No
3. If the answer is No, write down the name of 1 – 2 people who you believe would have influence on potential giving to the campaign.
4. For the lead donors who you believe would serve on the committee & those that could influence those donors, answer the following: What is your current relationship with this person, and who is best positioned to approach them?





Leadership Enlistment Process



When you are trying to recruit campaign leadership, you do not want to make official asks until you are fairly confident the person will say “yes”.

The first conversation you may have might be to just find out if they have an interest in getting more engaged and involved in the organization.



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





Campaign Steering Committee

**WE PUT THE
FUN
IN FUNDRAISING**

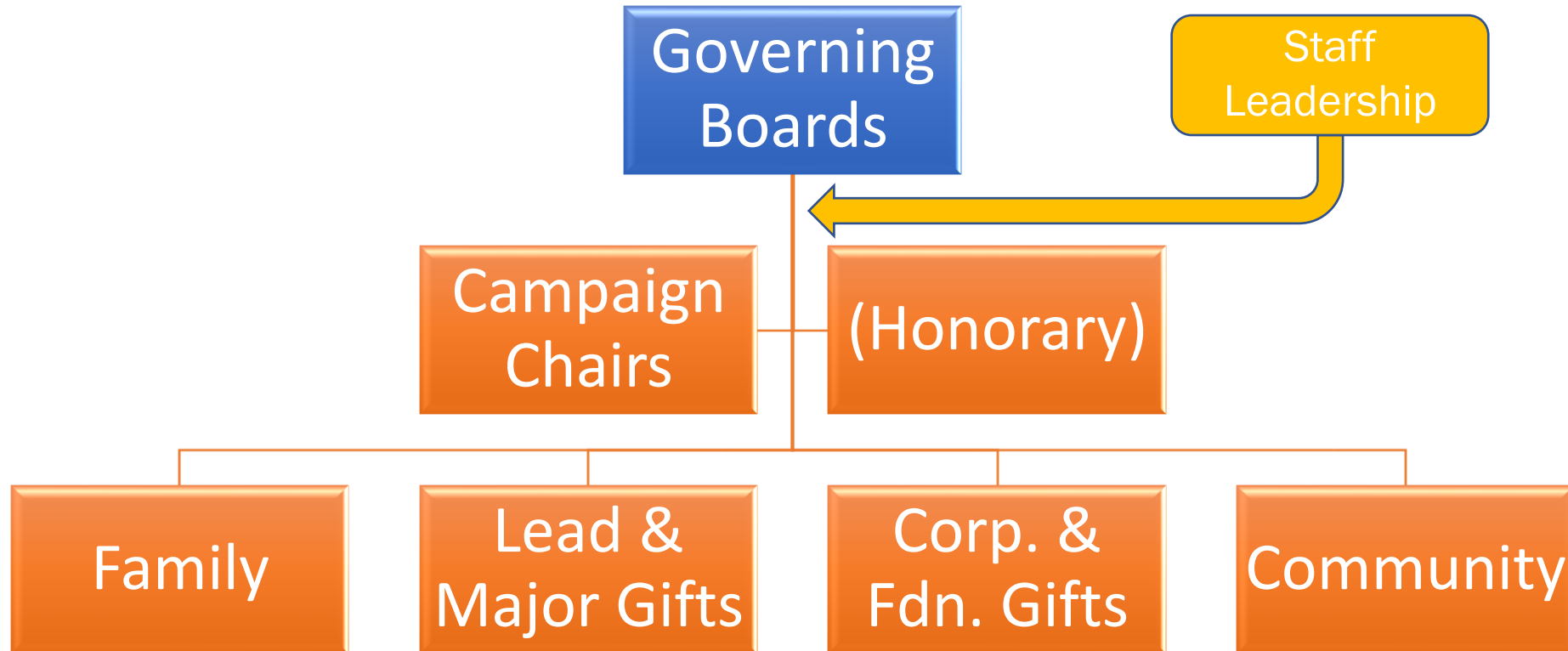
The Campaign Steering Committee...

- Provides strategic oversight and guides campaign execution
- Includes campaign chair(s), honorary chair(s), and approx. 6–8 appointed members
- Supports prospect identification, evaluation, and major gift strategy—especially during the quiet phase
- Sets committee goals
- Monitors campaign progress and addresses challenges early
- Meets monthly throughout the quiet phase
- Is supported by Campaign Director and fundraising counsel

Create sense of camaraderie!



Sample Campaign Org. Chart





Staff Roles in a Campaign

CEO / Executive Director (30% - 50% of their time)

- Serves as the public face and chief ambassador of the campaign
- Articulates vision, case for support, and organizational priorities
- Builds and stewards relationships with top donors and stakeholders
- Partners with campaign leadership on strategy and key solicitations
- Ensures board alignment and overall organizational readiness

Campaign Director

- Leads day-to-day campaign planning and execution
- Manages timeline, goals, and overall campaign progress
- Coordinates staff, volunteers, and Steering Committee activities
- Oversees prospect strategy, tracking, and reporting
- Prepares leadership for solicitations and supports donor engagement

Discussion:

Where does this feel doable—and where does it feel like a stretch?

What would have to happen to make this your reality?



Engaging Non-Fundraising Staff in the Campaign

Make the campaign everyone's mission

Connect the campaign to programs, impact, and daily work

Educate and inform regularly

Share updates and wins so staff understand progress

Define meaningful roles for all staff

Identify ways each team can contribute (storytelling, tours, donor touchpoints, etc.)

Equip staff with simple messaging

Provide talking points so everyone can confidently speak about the campaign

Invite participation—not just awareness

Include in celebrations, and appropriate campaign activities

Recognize and celebrate contributions

Reinforce that campaign success is a shared achievement





Lunch Announcements

*Dietary Restrictions





12:00 – 1:00
Lunch & Leader Chat with Harry Archer III



CAPACITY & STEWARDSHIP



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1:00 – 1:45

INTERNAL PREPARATION
& EXECUTION

CLARE

Capacity





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.”



Start with Staffing

#1 Problem: Turnover

- 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

KEY REPORT TAKEAWAYS





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

- Video is expected to account for **82%** of all online traffic in 2025
- 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.”

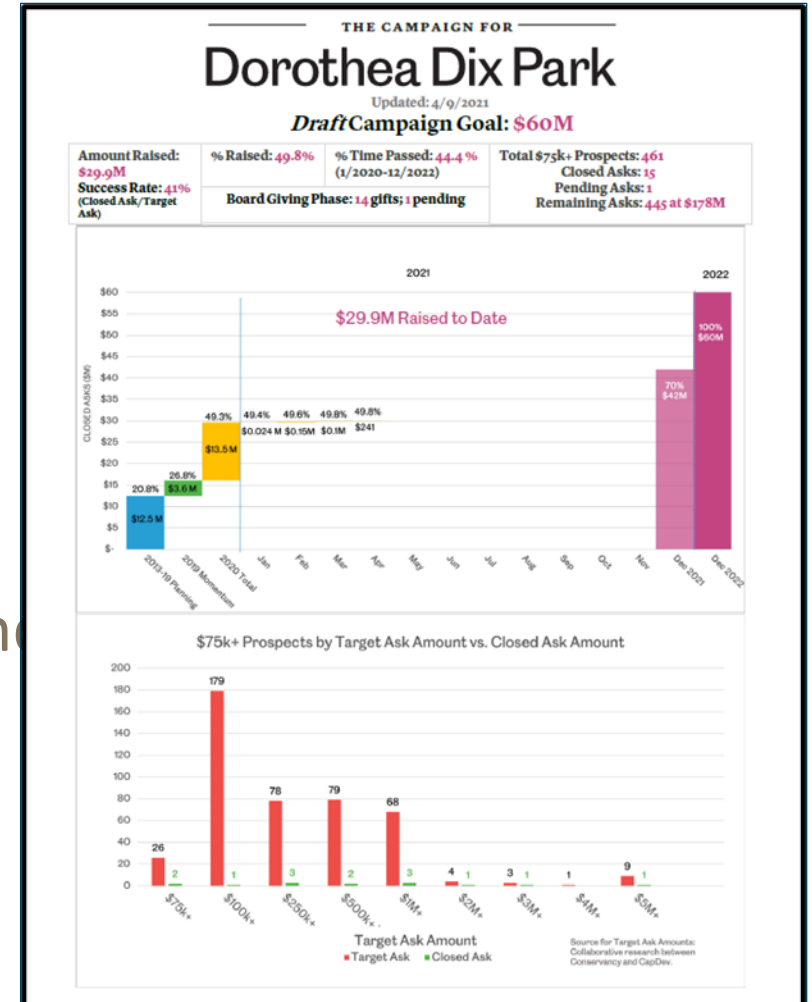


Communications: Donor Metrics & Reports

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 (trend)
- Purposeful contacts (# calls, solicitations...)

Use campaign reports (example →)





Communications



Is this appeal
relevant and urgent?

Why or why not?

Dear Friend,

*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!

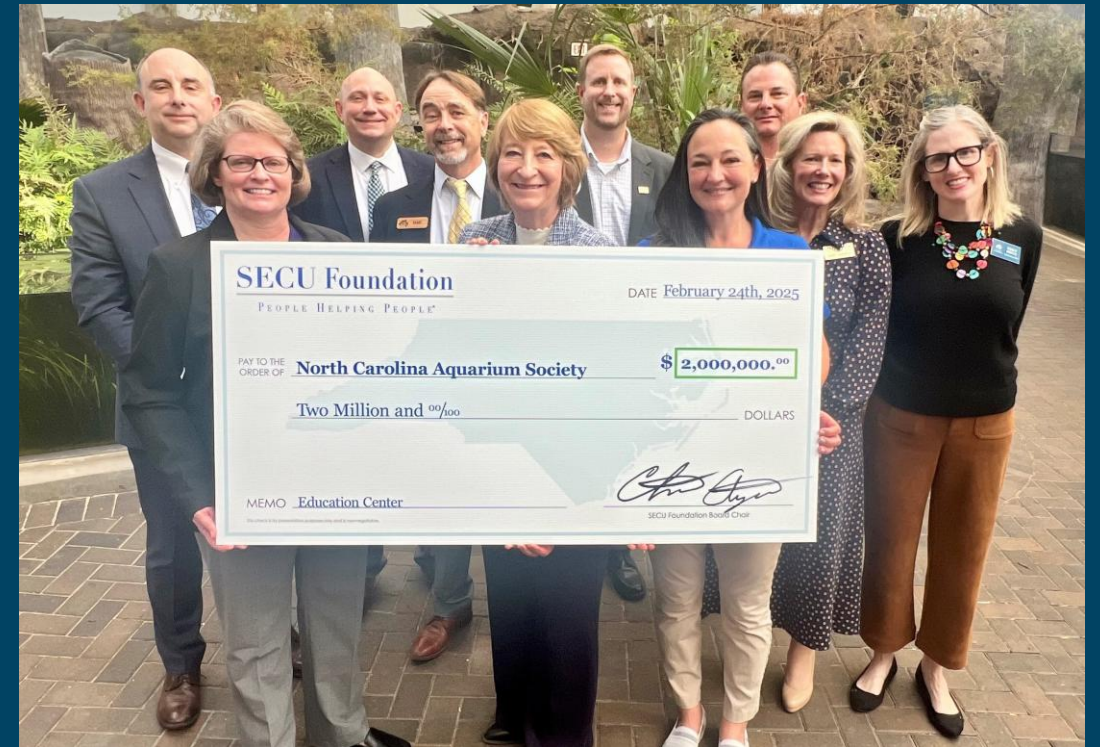


Appeal Letter Exercise:

Write a new 1st sentence
(Workshop Workbook pg. 26)



Stewardship





Example: Boys & Girls Club of Tar River

**Puzzle thank
you notecards:**

“You are a
piece of the
puzzle” in
making the
Dream Center a
reality.

+ scarves for
the tour on a
chilly day





What Is a Good Donor Retention Rate?

Average across nonprofits

45 to 60%

First-time donor retention

20 to 25%

Repeat or major donor retention

60 to 75%

90%

Monthly Donors



from doublethedonation.com



Calculating Your Donor Retention Rate

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

1. # donors who gave this year
2. On average, how much they gave
3. Your current donor retention rate
4. How much would you like to increase your rate?

How to Calculate Donor Retention Rate

$$\text{Donor Retention Rate} = \frac{\text{\# of Donors Who Gave Last Year and This Year}}{\text{Donors Who Only Gave Last Year}} \times 100$$





Calculate the Value of Improved Donor Retention

Original Retention Rate: 41%

YEAR	DONORS	AVG. GIFT*	TOTAL
Start	5,000	\$ 200.00	
2	2,050	\$ 220.00	\$ 451,000
3	841	\$ 242.00	\$ 203,401
4	345	\$ 266.20	\$ 91,734
5	141	\$ 292.82	\$ 41,372
6	58	\$ 322.10	\$ 18,659
7	24	\$ 354.31	\$ 8,415
8	10	\$ 389.74	\$ 3,795
9	4	\$ 428.72	\$ 1,712
10	2	\$ 471.59	\$ 772

Improved Retention Rate: 51%

YEAR	DONORS	AVG. GIFT*	TOTAL
Start	5,000	\$ 200.00	
2	2,550	\$ 220.00	\$ 561,000
3	1,301	\$ 242.00	\$ 314,720
4	663	\$ 266.20	\$ 176,550
5	338	\$ 292.82	\$ 99,040
6	173	\$ 322.10	\$ 55,560
7	88	\$ 354.31	\$ 31,170
8	45	\$ 389.74	\$ 17,480
9	23	\$ 428.72	\$ 9,810
10	12	\$ 471.59	\$ 5,500

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

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

Total Difference: \$ 456,349



Communications: Framing Your Stewardship Message

- 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],

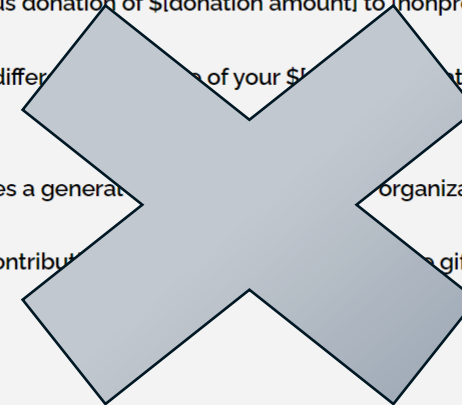
Thank you for your generous donation of \$[donation amount] to [nonprofit name].

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.

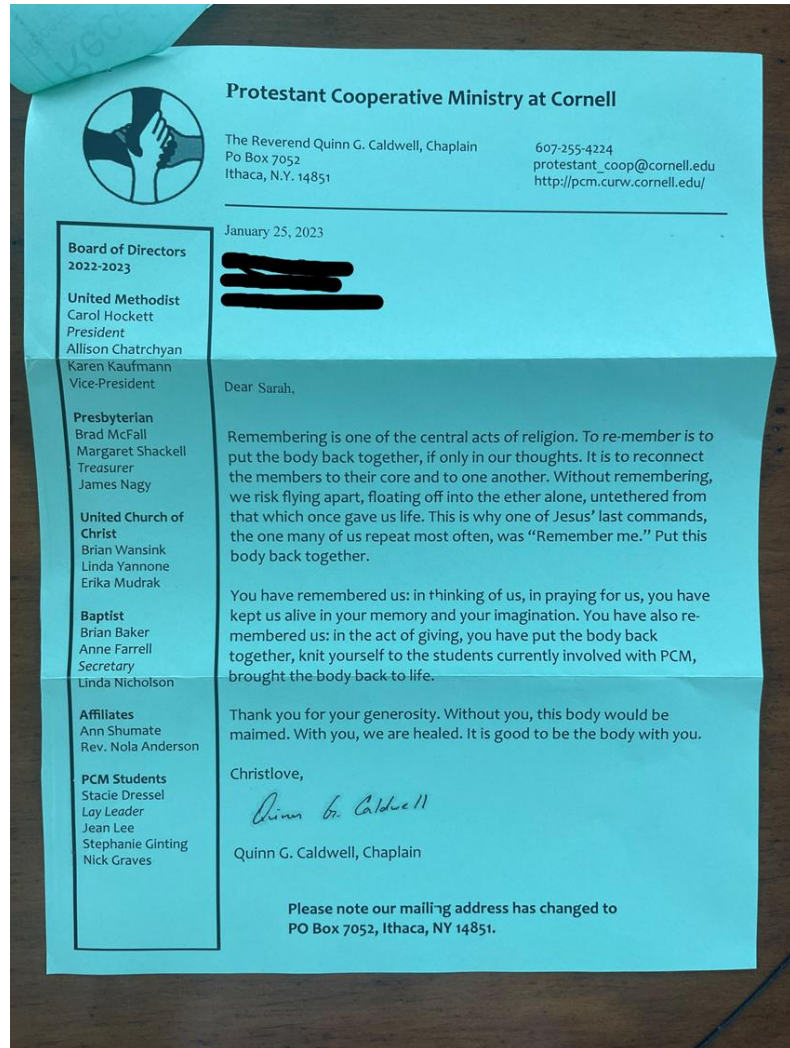
Sincerely,
[name and title]



- 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

★ NOTE: “What’s in a Name?”



Thank You Letter Exercise:

Write a new 1st sentence
without using the words,
“thank you”
(Workbook pg. 27)





What Do Supporters Want to See From You?

Show donors the impact of their giving!

A recent study of people who donate regularly found:

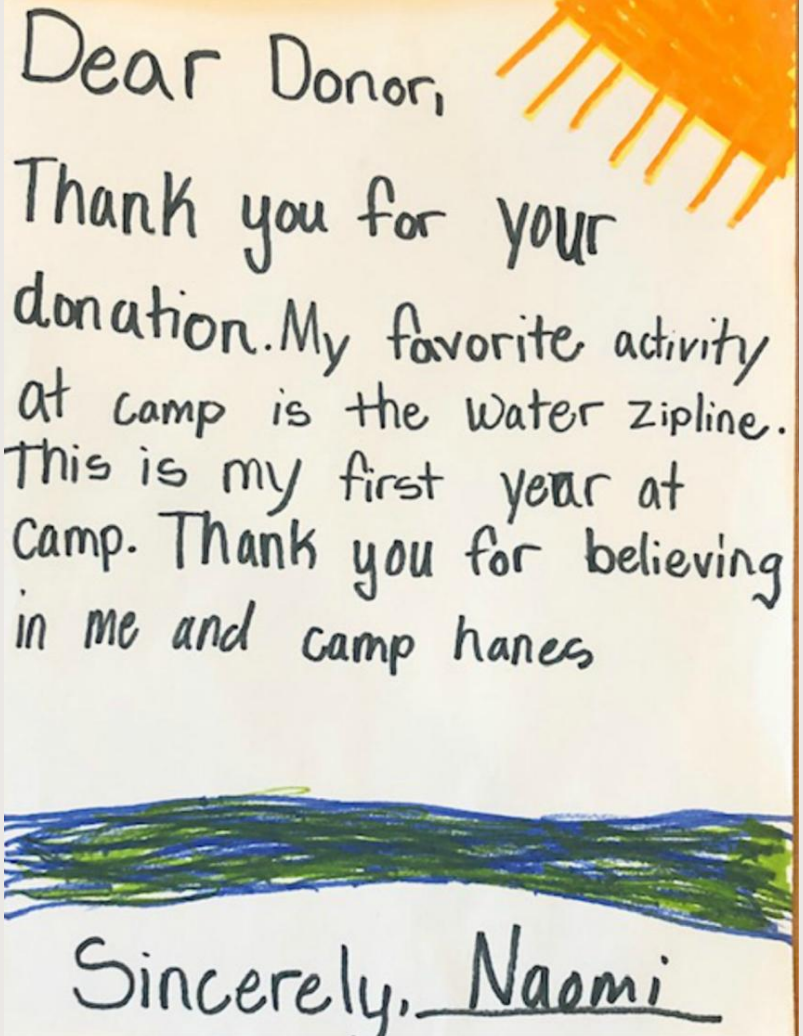
- 75% seek information about your **impact**
- 63% try to find **information on issues** you address
- 56% want a list of **specific projects** you support

*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 or news
- 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

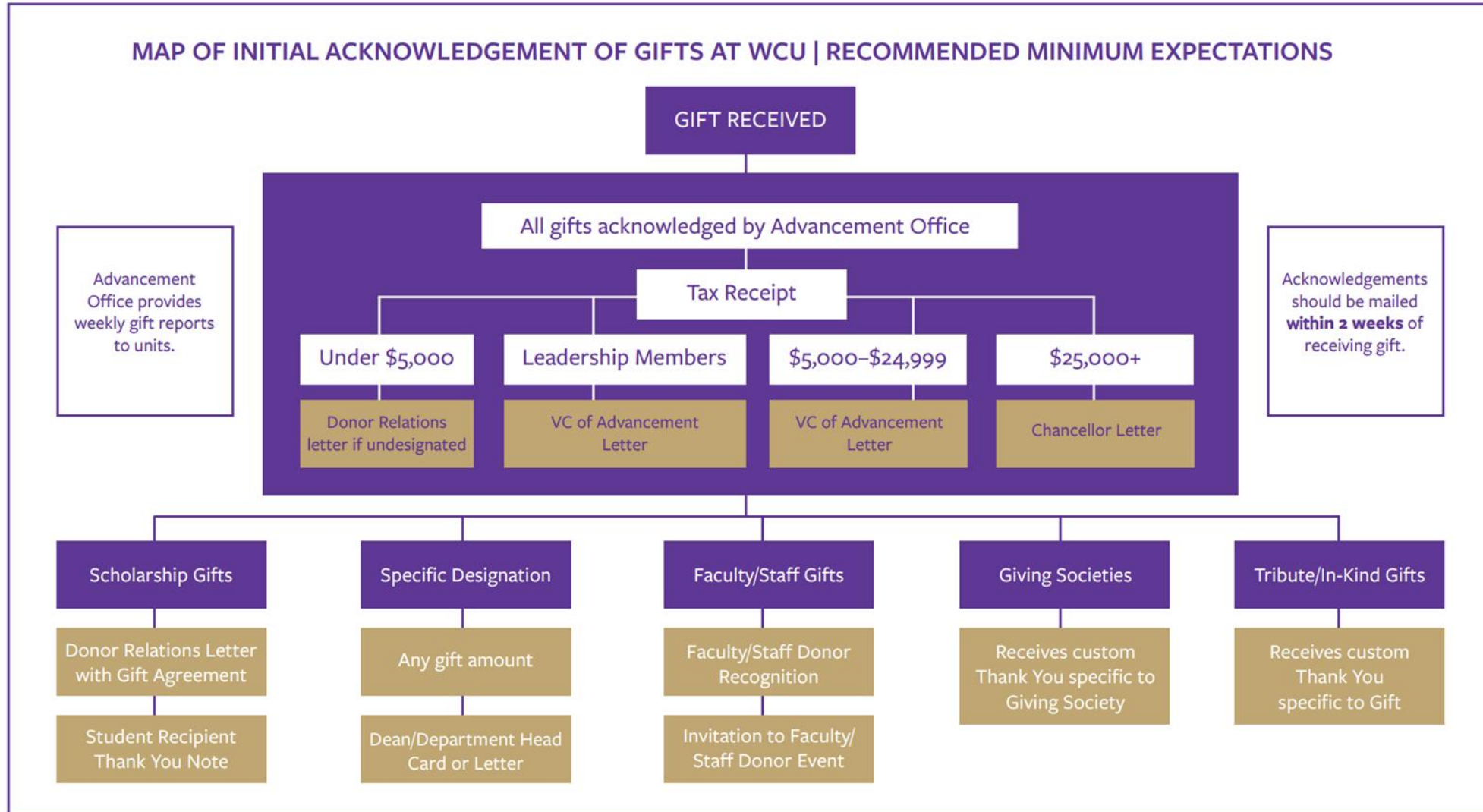
- Good stewardship is the antidote to poor retention rates
- Create a board-level **Stewardship Committee** charged with thanking donors
- Research shows that **increasing the donor retention rate** by 10% increases the value of the donor base by at least 50% (and up to 200%)
- Having a board member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



**Thankers
Become
Ambassadors**



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				
One-time	1,000 - 2,499											
Monthly	200 - 399	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	
One-time	5,000 & up											
Bequest			X	X			X	X	X	X		

“
You do not rise to the level of your goals. You fall to the level of your systems.
 JAMES CLEAR
Atomic Habits”



NC Aquariums Society: A “Fintastic” Celebration





1:45 – 2:00 Break



DONORS & ASKING

2:00 – 3:30

DONOR
DEVELOPMENT &
THE ART OF THE ASK

JENNIFER



Charting the Course
to Campaign with

CapDev

Donors





Improve This Appeal



How might you change this message to reflect an opportunity for meaningful giving?

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

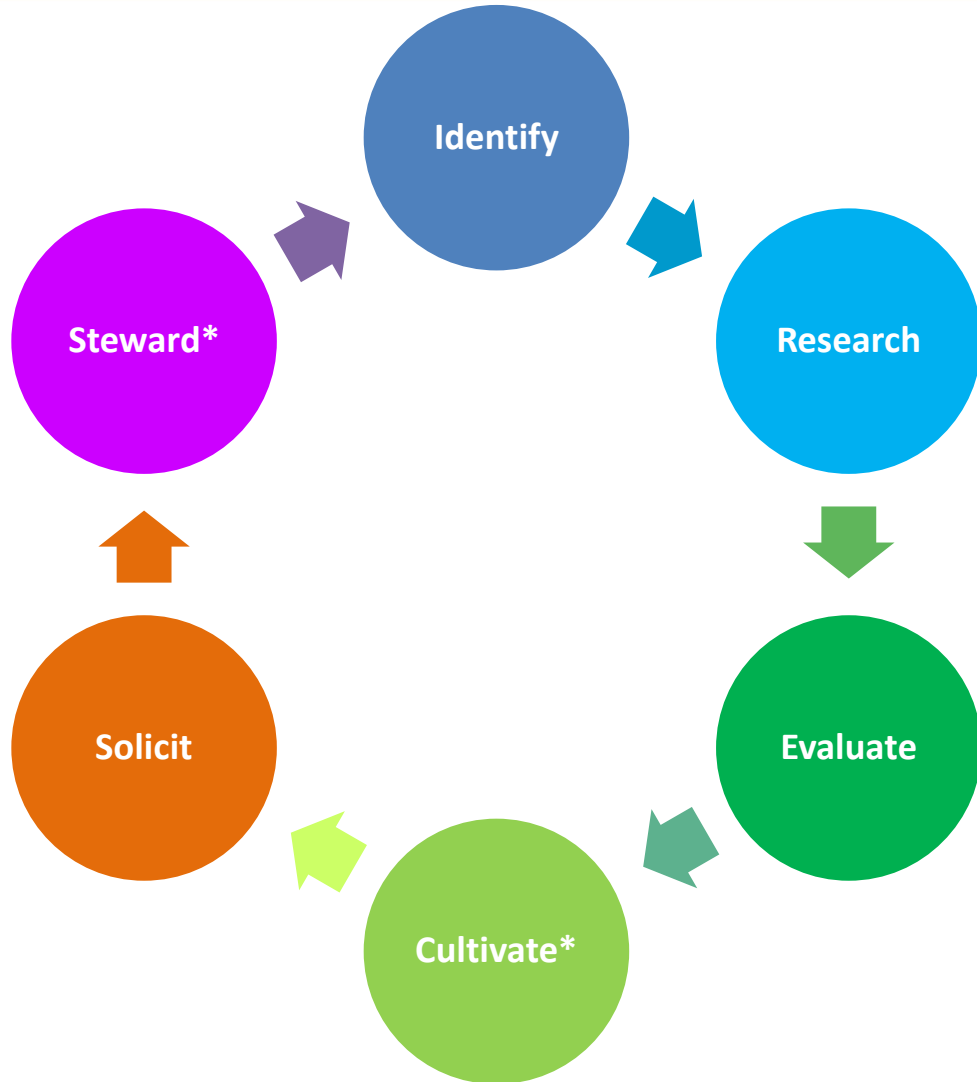
We need to raise \$250,000 by the end of June to meet our campaign goal.

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



The donor cycle is not just about asking for gifts—it's a **continuous process** where cultivation and stewardship require the greatest investment of time and care.

Building meaningful relationships before and after a gift is what sustains long-term support and ultimately drives successful fundraising.

Timeline for Major Gift Cycle: 1 – 3 years



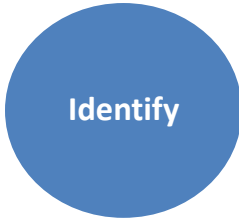
Example: \$10 Million Gift Chart

Donation Amount	# of Gifts Needed	# of Prospects Needed	Row Total	Cumulative Total	Cumulative % of Goal
\$2,000,000	1	3	\$2,000,000	\$2,000,000	20%
\$1,000,000	2	6	\$2,000,000	\$4,000,000	40%
\$500,000	4	12	\$2,000,000	\$6,000,000	60%
\$250,000	6	18	\$1,500,000	\$7,500,000	75%
\$100,000	8	24	\$800,000	\$8,300,000	83%
\$50,000	12	36	\$600,000	\$8,900,000	89%
\$25,000	20	60	\$500,000	\$9,400,000	94%
>\$10,000	Many	Many	\$600,000	\$10,000,000	100%
	53+	159+	\$10,000,000		

Campaign success is driven by a small number of major gifts, **typically by 40–60 donations**. Smaller gifts are important, but they cannot replace the impact of top-level contributions.



Identifying Potential Major Donors



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



Using Data Analytics to Identify Best Potential Donors

Using Data Analytics to Identify Lead Donors

- Strong campaigns begin with data by analyzing giving history, engagement, and capacity to identify top prospects.
- Tools like **RFM (Recency, Frequency, Monetary)** and **Wealth Screening** help uncover donors with the greatest potential for leadership gifts.
- **AI-powered analytics** can accelerate this process by identifying patterns, predicting giving likelihood, and prioritizing outreach.

Using AI Responsibly

- Protect donor privacy and avoid sharing personally identifiable or sensitive data in unsecured tools.
- Use trusted, organization-approved platforms with clear data policies.
- When possible, anonymize or aggregate data before analysis.



Recency

Most recent gift received



Frequency

How often they give to you



Monetary

Lifetime dollars donated



Prospect Research

Prospect Research Tools in your Workshop Workbook

★ Workbook pg. 35-40



- 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/Wealth Screening Info
- Relationships – Organizations, Family, Businesses



This information should be shared with volunteers assisting with prospect visit.
Can also be used when creating event briefings for outreach events.



Ways to Forge Stronger Connections with Supporters

- **Set up in-person meetings** – Meet for coffee, at their home/office, or for a beverage/meal after work
- **Get on the phone.** - Check in, provide updates, say thank you, invite to volunteer, request a meeting, etc.
- **Send a personal note**, email or text.
- **Invite** donor to serve on a committee or participate in a one-day project.
- **Give tours of your facility** and share information about your programs.
- **Honor longtime volunteers or donors** at your nonprofit events
- **Hold an outreach event** just for prospective donors.
- **Provide opportunities for donors to interact** with program directors/artists/educators.
- **Ask for feedback** on your plans and priorities.
- **Wish them a happy birthday** with a call, card, or gift.
- **Mail a holiday card.**
- **Ask about their family**, spouse, children, grandchildren and pets.
- **Inquire** about their job, industry, or hobby.

Evaluate

Cultivate



Cultivation Case Study Exercise

Workbook pg. 30





Exercise: Cultivation Case Studies

We will break into 3 groups and review a cultivation case.

Cultivate*

1. Select a scribe to take notes. Select one person to present your ideas on next steps.
2. Review your respective case scenario.
3. Answer the question: What are possible next steps in cultivating this relationship?
4. We will reconvene and each group will talk about their case.



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*



Managing a Major Gift Portfolio

Identify **50–75 qualified major gift prospects**

Prioritize quality of relationships over quantity of names



Segment Your Portfolio (Rule of Thirds)

Top Tier (Top 1/3)

Closest relationships; highest capacity and inclination

Primary candidates for leadership and stretch gifts

Middle Tier (Middle 1/3)

Strong potential; require deeper cultivation

Opportunity to move into top tier with intentional strategy

Emerging Tier (Final 1/3)

Lower on the gift chart but with growth potential

Focus on qualification and engagement



Managing a Major Gift Portfolio (continued)

Match Strategy to Opportunity

Top Tier: 6+ meaningful touches/year (personalized, strategic, often 1:1)

Middle Tier: ~4 touches/year (mix of personal outreach and targeted engagement)

Emerging Tier: 2–3 touches/year (qualification and relationship-building)



Cultivate*

Key Principle

Spend the **majority of your time on the top third**, while consistently moving donors up through the pipeline



Cultivation Visits: Staff/Volunteer Roles

Guiding principles:

The donor speaks 70–80% of the time

We are building a relationship, not conducting an interview

Curiosity leads; connection comes before content

Success = stronger relationship + insight for future engagement



Volunteer

(Lead Relationship Builder)

- Leads the relationship and sets the tone
- Opens and closes the visit
- Builds personal connection and rapport
- Asks key discovery questions

Nonprofit Executive/CPO

(Organizational Voice + Guide)

- Supports conversation flow
- Listens for themes, motivations & signals
- Connects donor interests to mission and future vision
- Introduces the campaign naturally when appropriate



Components of the Asking Process

Asking is 90% preparation.

1. Making the appointment – Know what to do if you are not getting a response.
2. Materials preparation & usage
3. Role play with others going on appointment (Ideal – 2 people)
4. Determine Ask Amount - Range
5. Responding – THANK YOU no matter what they say.
6. Following up – Keep the ball in your court. Have a plan prior to the visit – who will call, write the note, send an email.

Solicit

★ Workbook pg. 32-33



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

Solicit Exercise:

Ask your neighbor for \$10,000 for your organization.

“Would you consider a gift of \$10,000 to”

Ask Language in Workbook: pg. 32-33





Stewarding Campaign Donors

- **Provide Regular VIP Communications Updates** – Ex. Personal Emails from CEO/Campaign Director
- **Place Donors in Someone’s Portfolio**
- **Ensure that Campaign Donors are Included on Organization’s Invite Lists** – Create an “Always List” and share with other staff.
- **Add Donors to Organization’s Regular Communications** – newsletters, annual reports
- **Membership-Based Organizations** – Consider if Donor should receive VIP/Comp Membership
- **Be Thoughtful on How to List Donors in Annual Reports** when the campaign is still in the Quiet Phase
- **Construction Projects** – Hard Hat Tours; Steel Signing Parties
- **Plan for Impact Reports** during construction and after project is complete.





Example: Impact Statement



An Impact
Report for
The XXX Family

Share a Personal Impact Report with Major Donors

- Photos
- Personal letter
- Scholarship recipients; profile
- Donor Testimonials
- Narrative descriptions from those impacting from investment
- Provide Up to Date Financial Impact – ex. Value of Endowment; #s Served

Steward*

CLOSING

3:30 – 4:00

MAJOR THEMES &
TAKEAWAYS

CLARE



Charting the Course
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Key Themes & Top Trends Cited Today:

Shift focus to
major giving

Prioritizing
donor relations,
retention

Board
Leadership

Value of data
analytics

Stewardship

High Tech –
High Touch



Takeaways

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

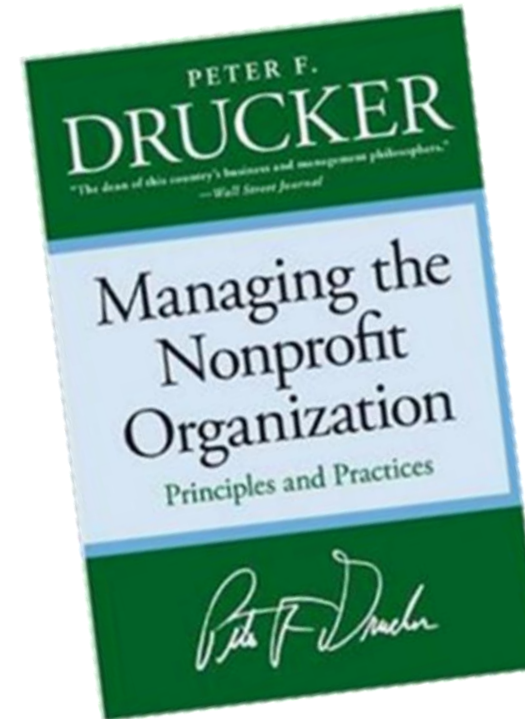


" What did you take away from the meeting ? "



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*



Thank you



Charting the Course
to Campaign with
CapDev

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Q&A and Discussion