



PRESENTATION TO

NCAIS: Small Schools

Building a Culture of Philanthropy

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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

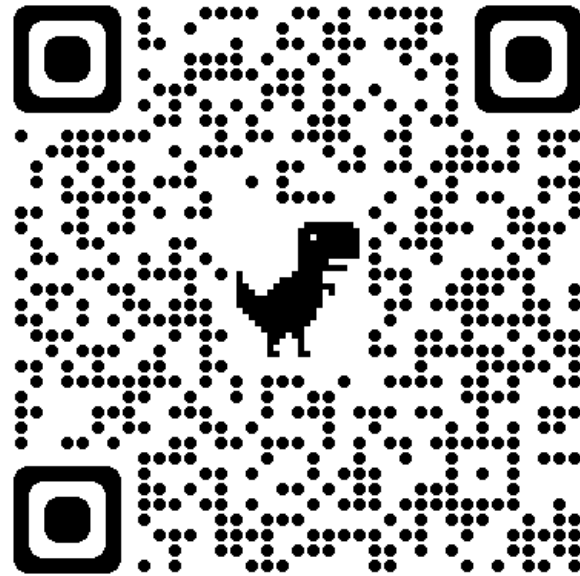
We transform lives through relational philanthropy.



Serving nonprofits across the Southeast since 1984

Development Planning & Campaigns
Executive Search

Download today's slides:





ABC Organization



Agenda

Meaning of Culture of Philanthropy

Groundwork for Major Gifts Program

Activating Your Community

Takeaways

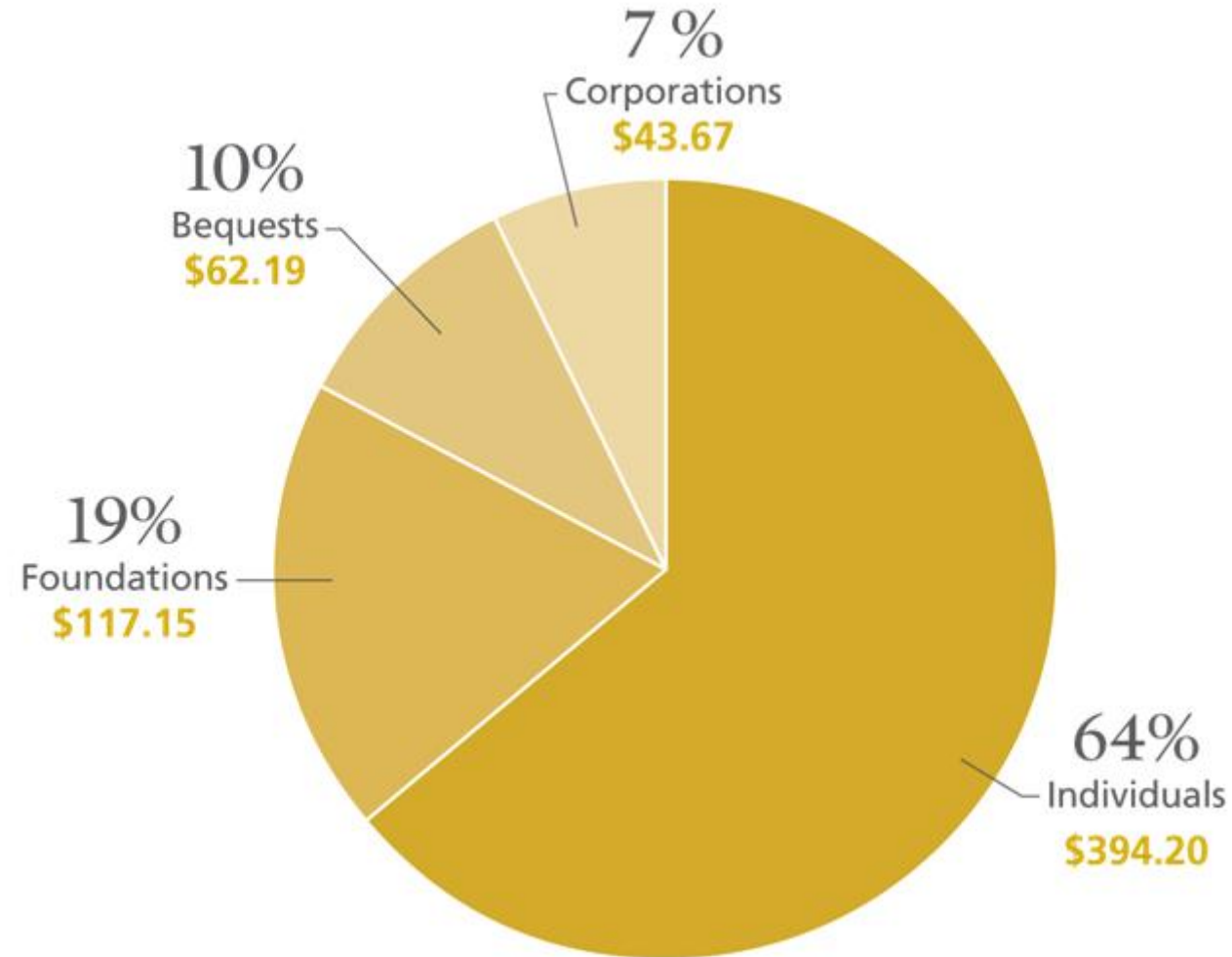


Why do we need to build culture?



Sources of Giving: \$617.20 Billion in 2025

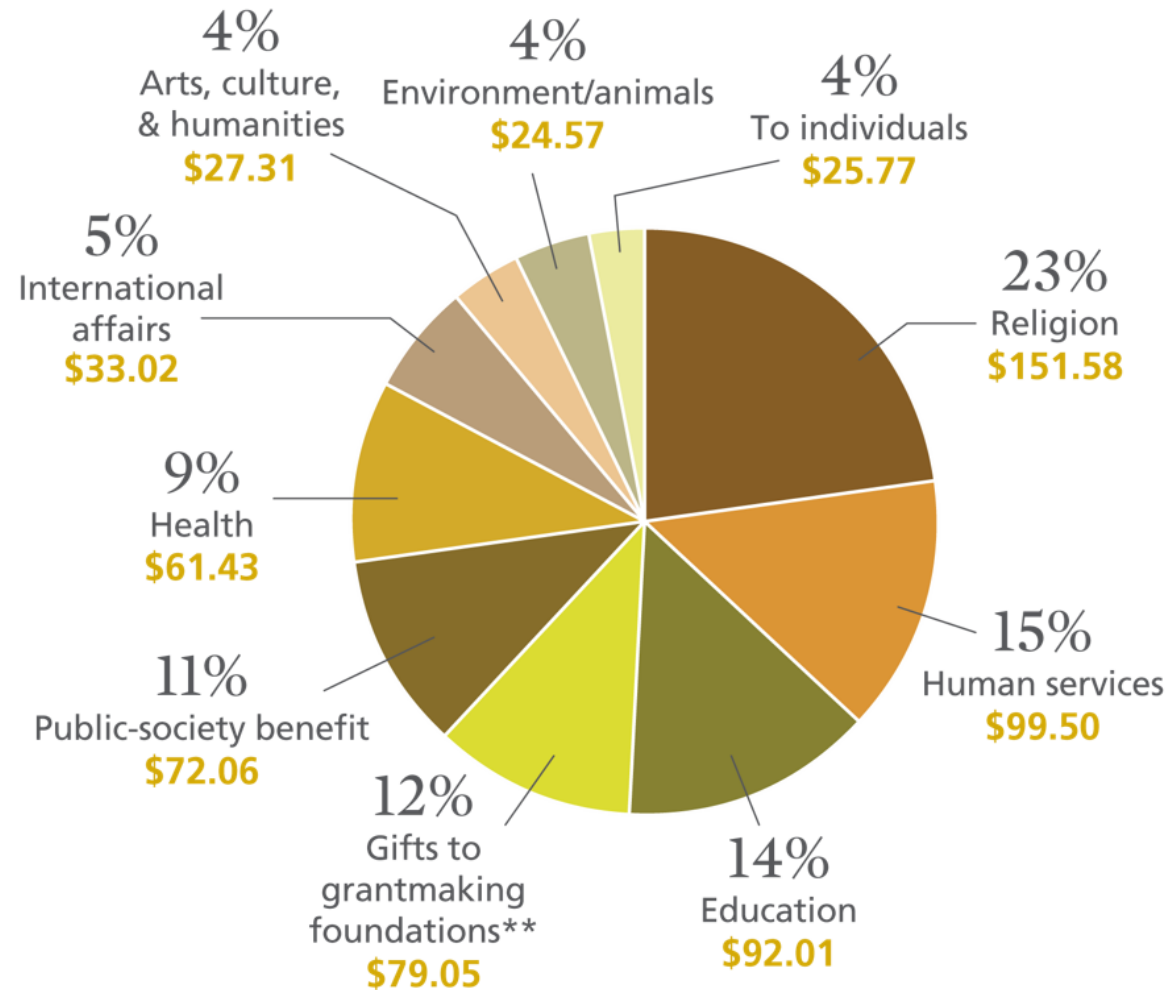
5.7%
increase





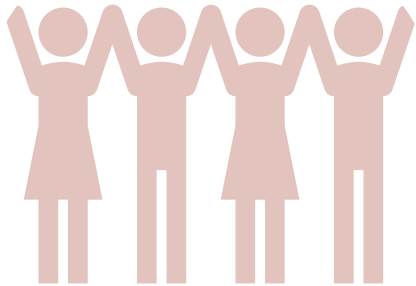
Recipients of Giving: \$617.20 Billion in 2025

5.7%
increase





AFP: Fundraising Effectiveness Project Q4 2025



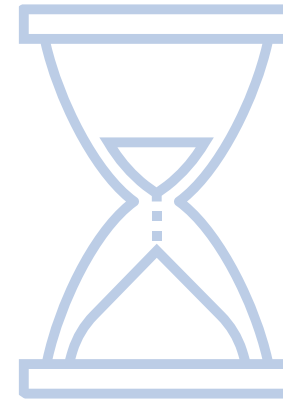
3.6% decline

Total number of donors



5.0% increase

Total dollars raised



0.2% increase

Donor retention rate



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

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

Philanthropy: *Relational*

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

Transformational!



The Definition of “Transactional Fundraising”



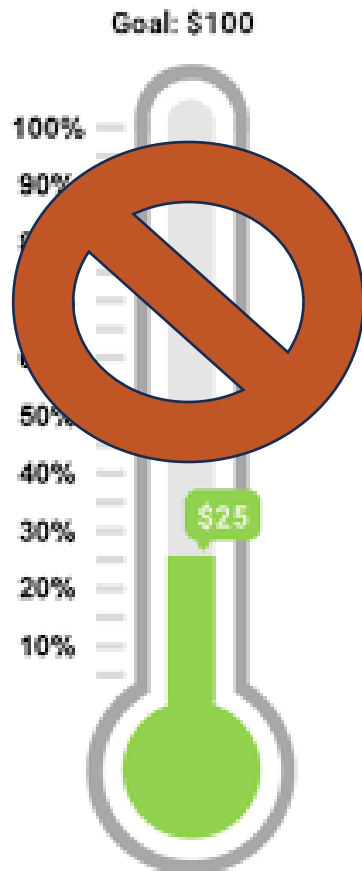
DIP IT!

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.”



Culture Builds Toward 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



Laying the Groundwork for a Major Gifts Program



Seeking Major Donors

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?

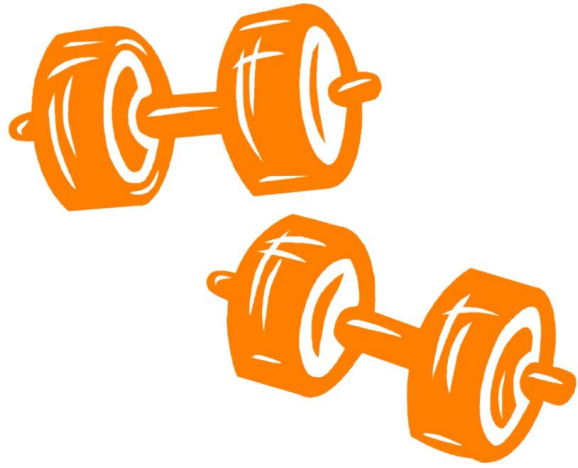
*I promise I will not keep bothering you
with future requests.”*



Why do you need a MG Program?



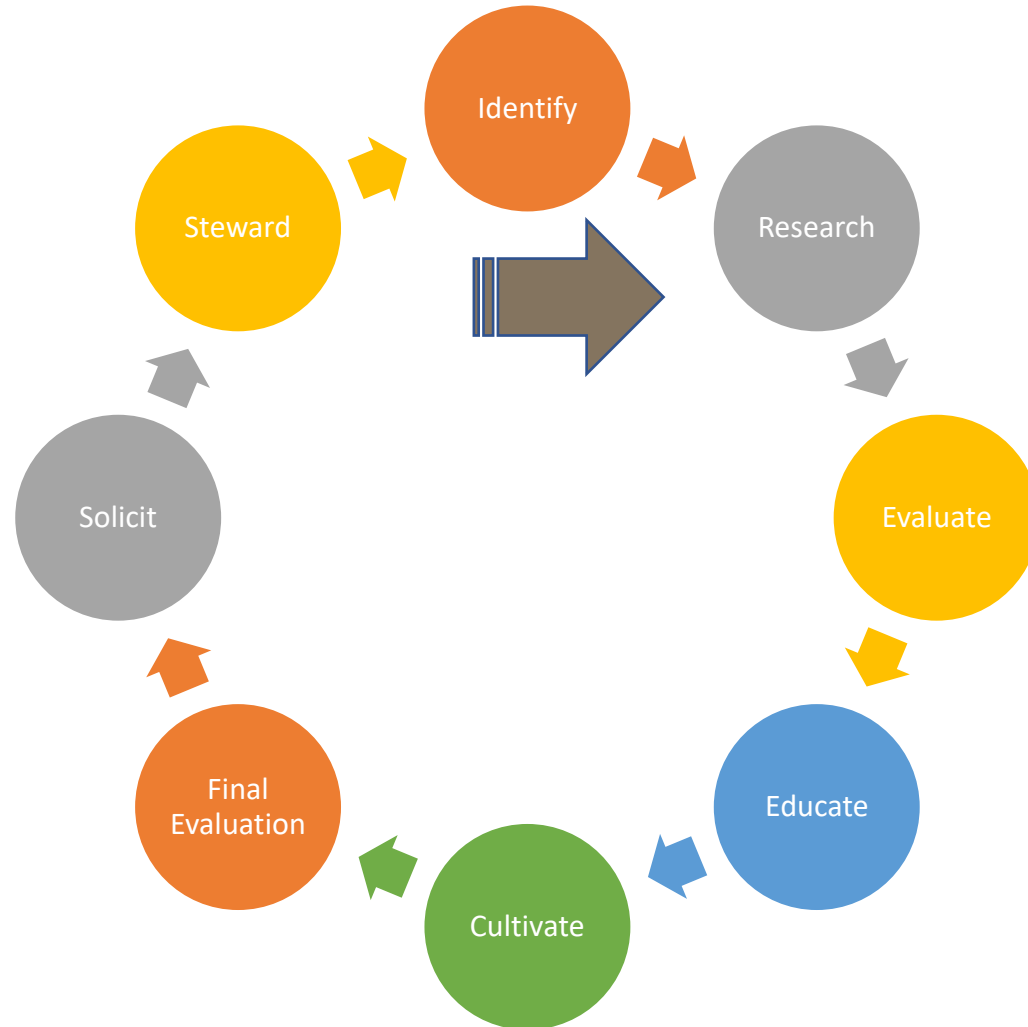
Why the MG Muscle Matters



- **87%** of all giving comes from individuals (*Giving USA*)
- # of donors ↓; amount given ↑ ([*FEP*](#))
- 75% of donors say finances are negatively impacted by inflation but **80%** continue giving (*Sustainable Giving Report*)
- **DAFs** hold more than \$228 billion (*National Philanthropic Trust*)
- Wealth transfer over **\$73T** (Bloomberg)



Donor Relations Cycle

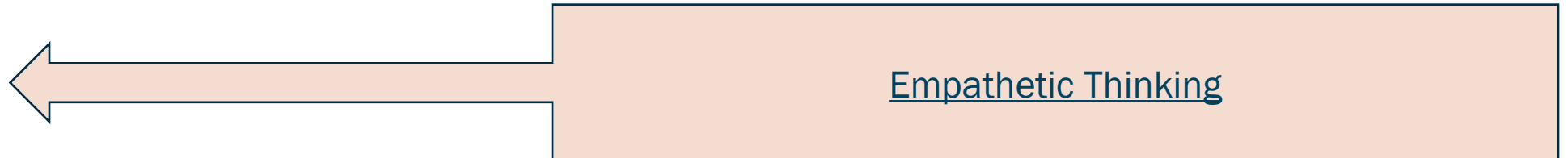




Journey Mapping the Donor Experience

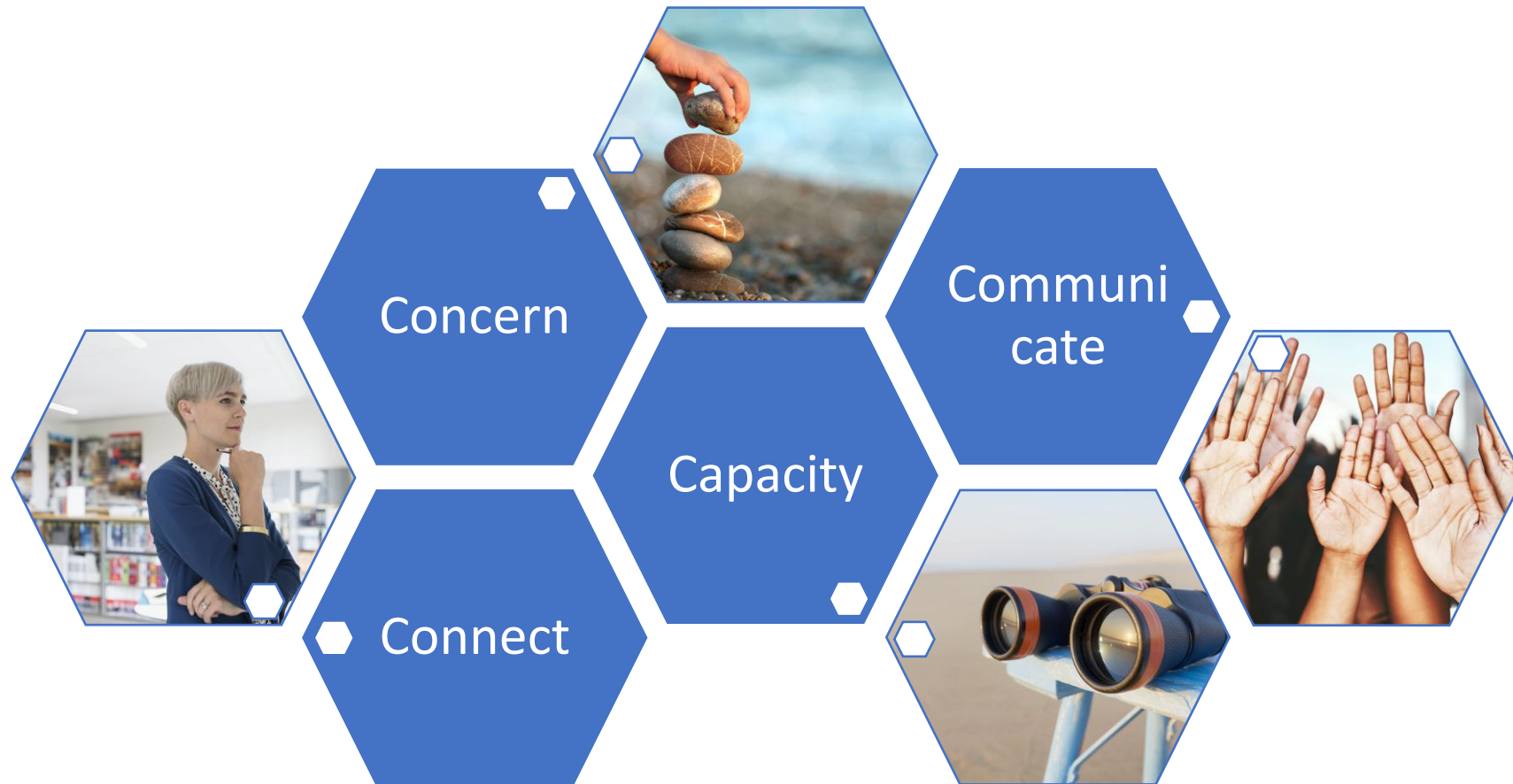
	Engagement	Participation	First-time Gift	Loyal Donor	Major Gifts	Principal Gifts
Current State Unaware of opportunity	Unaware → initial connection	Action taken → grow size of community	1 gift → stewardship	Move from 1 st time to multiple-time donor	Authenticity influences regularity/size of gifts	Need to learn about add'l giving opps.
Ideal Future State 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?





Who Makes a Good Prospect?





Who are Your Best Potential MG Donors?

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

from Bloomerang



Recency

Most recent gift received



Frequency

How often they give to you



Money

Lifetime dollars donated



Identifying Major Donors

1. Approach your **current donor** list
2. Tap into the benefits of shared beliefs
3. Explore the giving potential of your **mid-level** donors
4. Narrow down **top-tier** donors to a small, select group
5. Consider financial **capacity** of current donors
6. Look for **new prospects** outside of your donor database
7. Find donors who support **related causes**
8. **Leverage** supporters' relationships with other potential donors
9. Seek out **opportunities to interact** with potential donors



From Bloomerang



Tips to Strengthen MG Relations

Remember, it's all about the *quality* of major gift prospects; not the *quantity*!

1. Ask for supporters' feedback
2. Learn what motivates donors to give
3. Track and review behavioral data
4. Maintain an open line of communication
5. Show donors the impact they're making – make donor the “hero”
6. Look at wealth indicators
7. Focus on donor stewardship

From Wealth Engine, January 2020



Major Donor Cultivation

1. Reconsider your perspective on priorities for sources of philanthropy
2. Build philanthropy by connecting with donors, building relationships that foster interest in major gifts
3. Develop customized approaches in your donor cultivation tools



★ Do you know your Top 25 & have strategies for each?

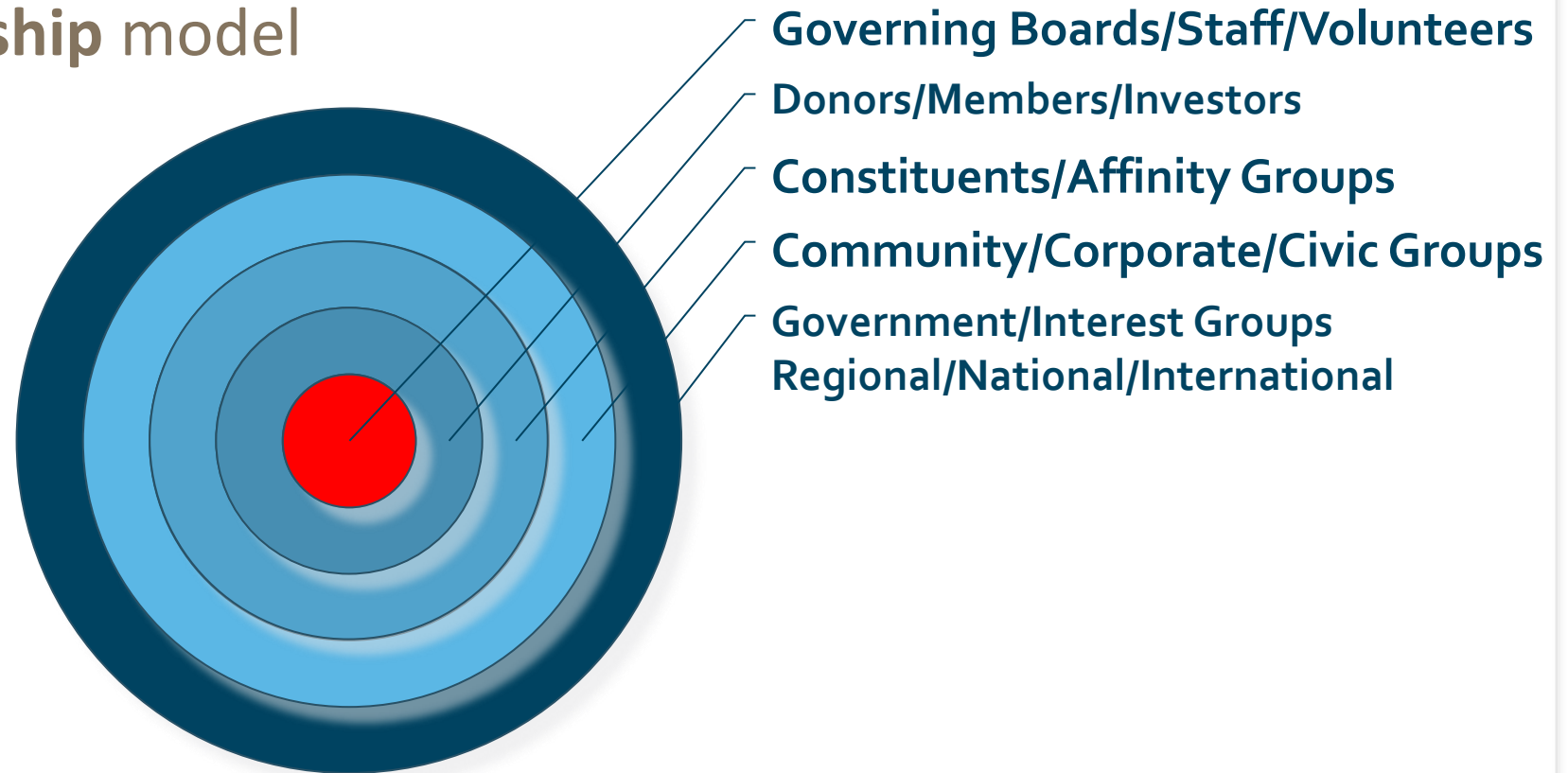


Build a Robust Individual Giving Platform

1. **Identify** MG prospects
2. Establish **cultivation** process
3. Formulate **stewardship** model

4. Know **MG team**:

- Executive Director
- Sr. Staff
- Advancement staff – “generalists”
- Board of Trustees
- Other volunteers “advisory”



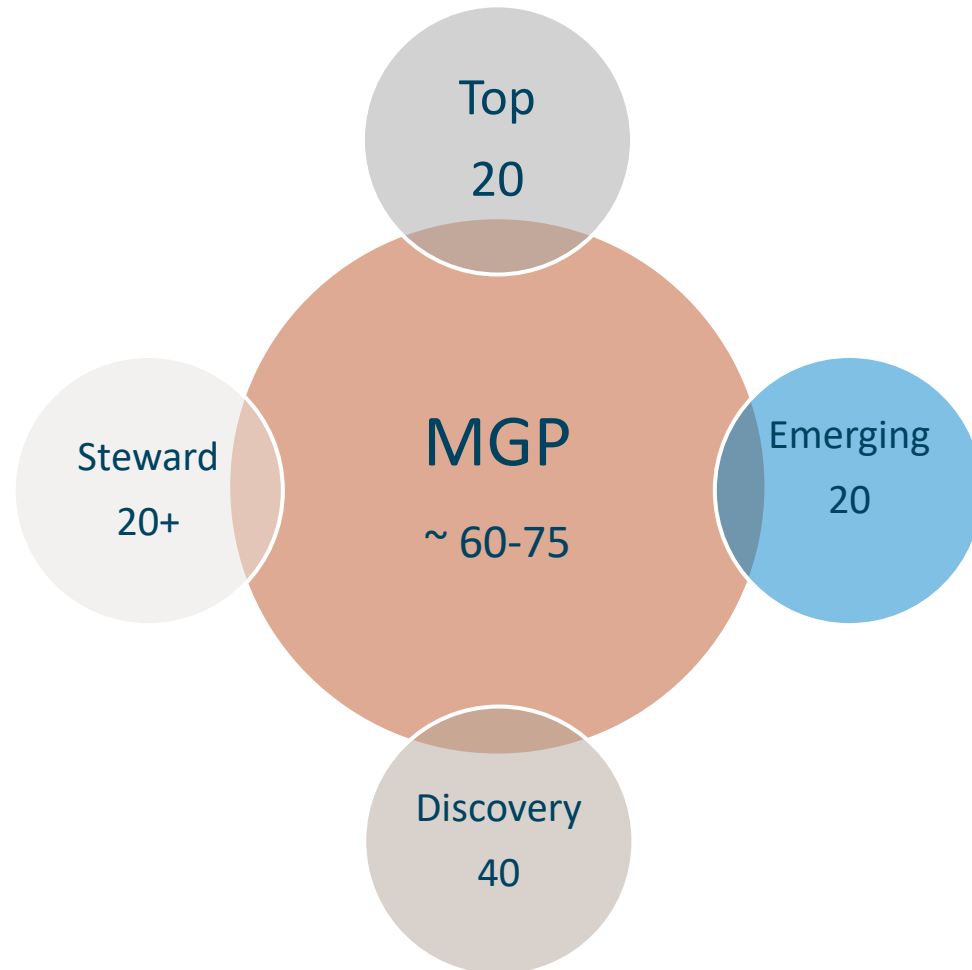


Moves Management: Prioritizing Grid

ABILITY → AFFINITY ↓	1	2	3
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



1. Top

- *Solicit next 12-18 mos.*

2. Emerging

- *Move to Top in 12-18 mos.*

3. Discovery

- *Move to Emerging in 6 mos.*

4. Stewardship

- *Gift; move to Emerging*



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

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*



Stewardship is Essential to Building Culture

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	
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



Best Advice: keep in touch with 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.



Activating Your Community



Communications to Inspire MG

Make full use of communications tools:

- **Website** – user friendly and current; easy to find contacts
 - **Emails** – remember your reply signature too
 - **Social Media** – have a plan and a person responsible for managing it
 - **Printed Materials** – minimal, attractive, functional
 - **Biz Cards**
 - **Appeal Letters** – concise, tell a story, clear ask, include hand-written note
 - **Thank You Letters** – personal, prompt, powerful
- ★ **Stories sell. Statistics tell.**



Think About Events Differently

- Hold smaller, intentional events
- Examples:
 - Legacy Trustee Chairs event
→ now annual (in homes or club)
 - Held Legacy Faculty and Staff event
→ now annual
 - Targeted neighborhoods
 - Downtown staffers
 - Legacy Family event





Have Fun: “Fintastic” Aquariums TY/Kick-off





Takeaways

Outcomes from this time:

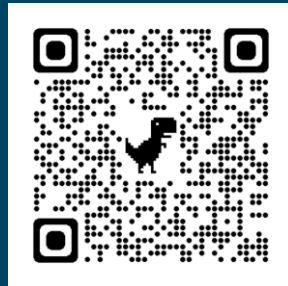
- What is most needed?
- How do you get started?
- 3 things you could do now...



" What did you take away from the meeting ? "



Thank you



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Q&A and Discussion