



PRESENTATION TO

The Pines at Davidson

Building a Culture of Philanthropy
in Preparation for Campaign



Serving nonprofits across the Southeast since 1984

Development Planning & Campaigns
Executive Search



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.

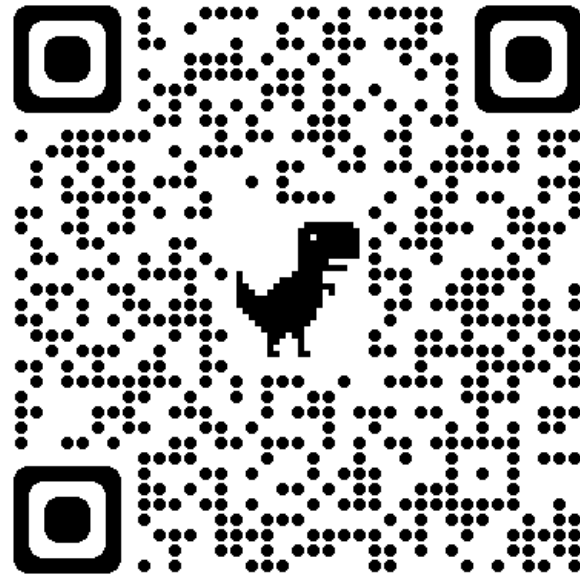
Embolden

We encourage talent and leadership.

Embrace

We transform lives through relational philanthropy.

Download today's slides:





The Pines: Staff Leadership



Agenda

Why you serve

Philanthropic Trends

Culture & Components of Philanthropy

Roles

Takeaways & Next Steps



Introductions: your “why”

Who are you?

Remember your
first visit to The
Pines at Davidson

Name the
sentiment

Why you serve

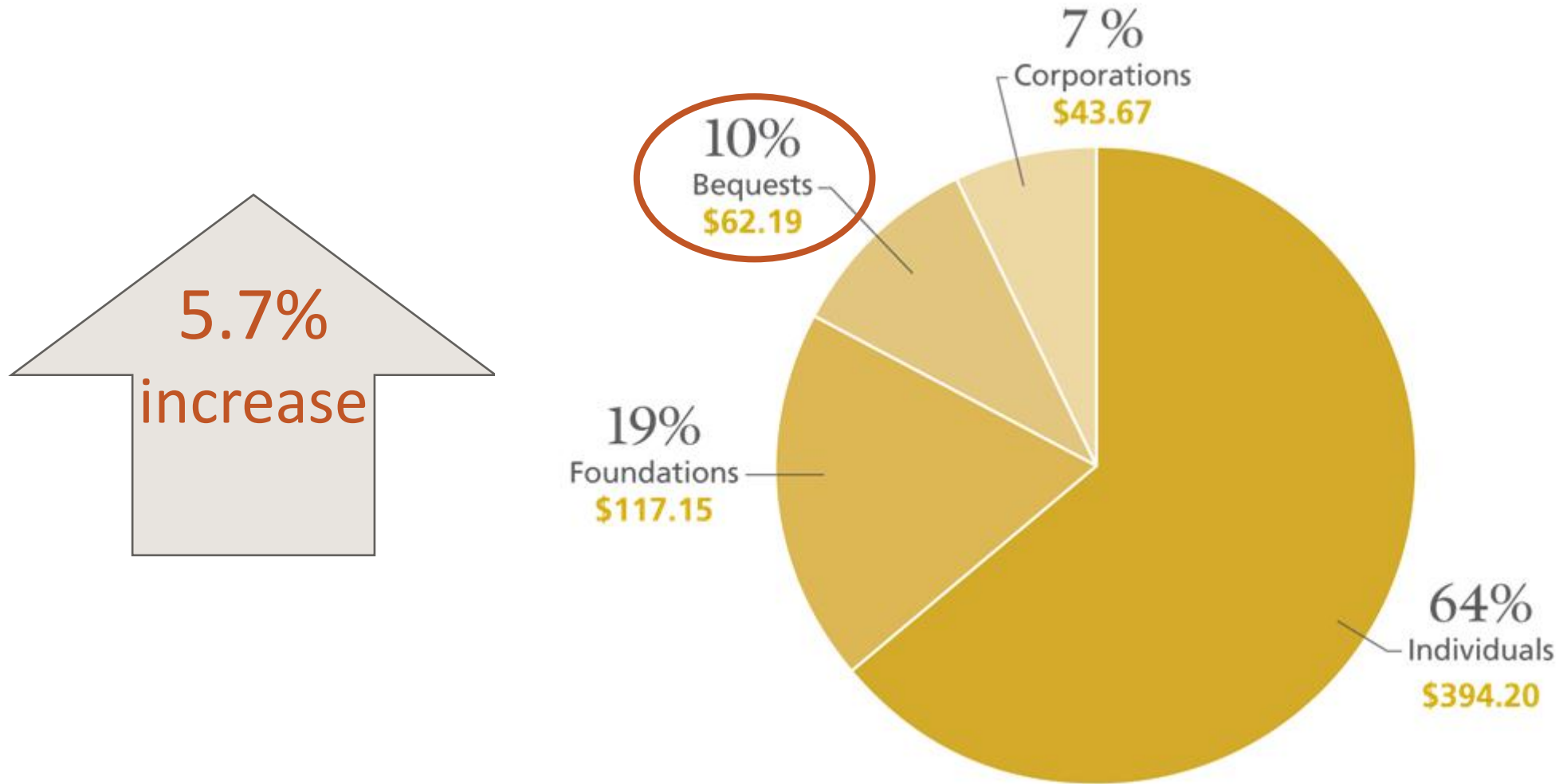




Inspiration from Data:
How we determine focus of philanthropy
When we talk about giving, people give



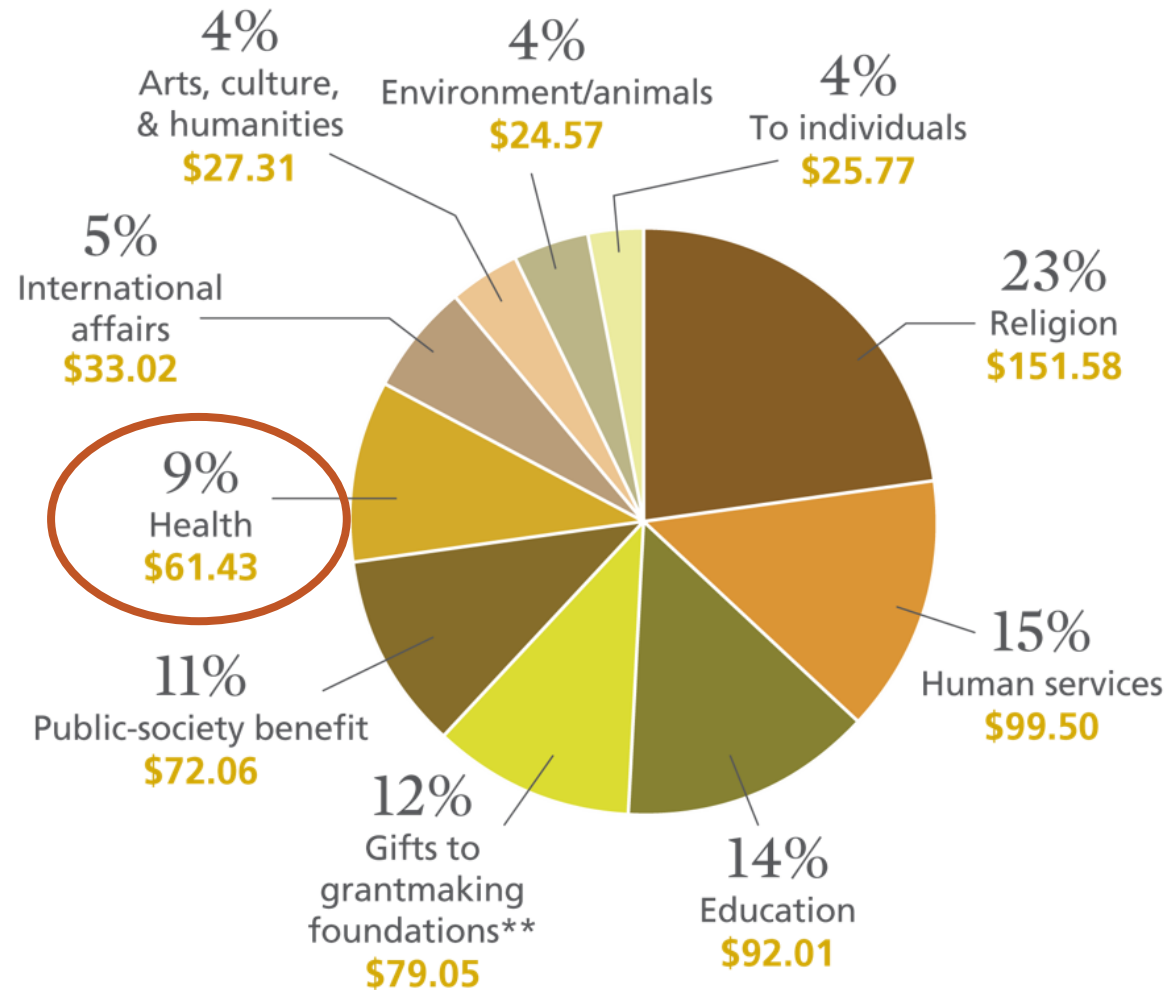
Sources of Giving: \$617.20 Billion in 2025





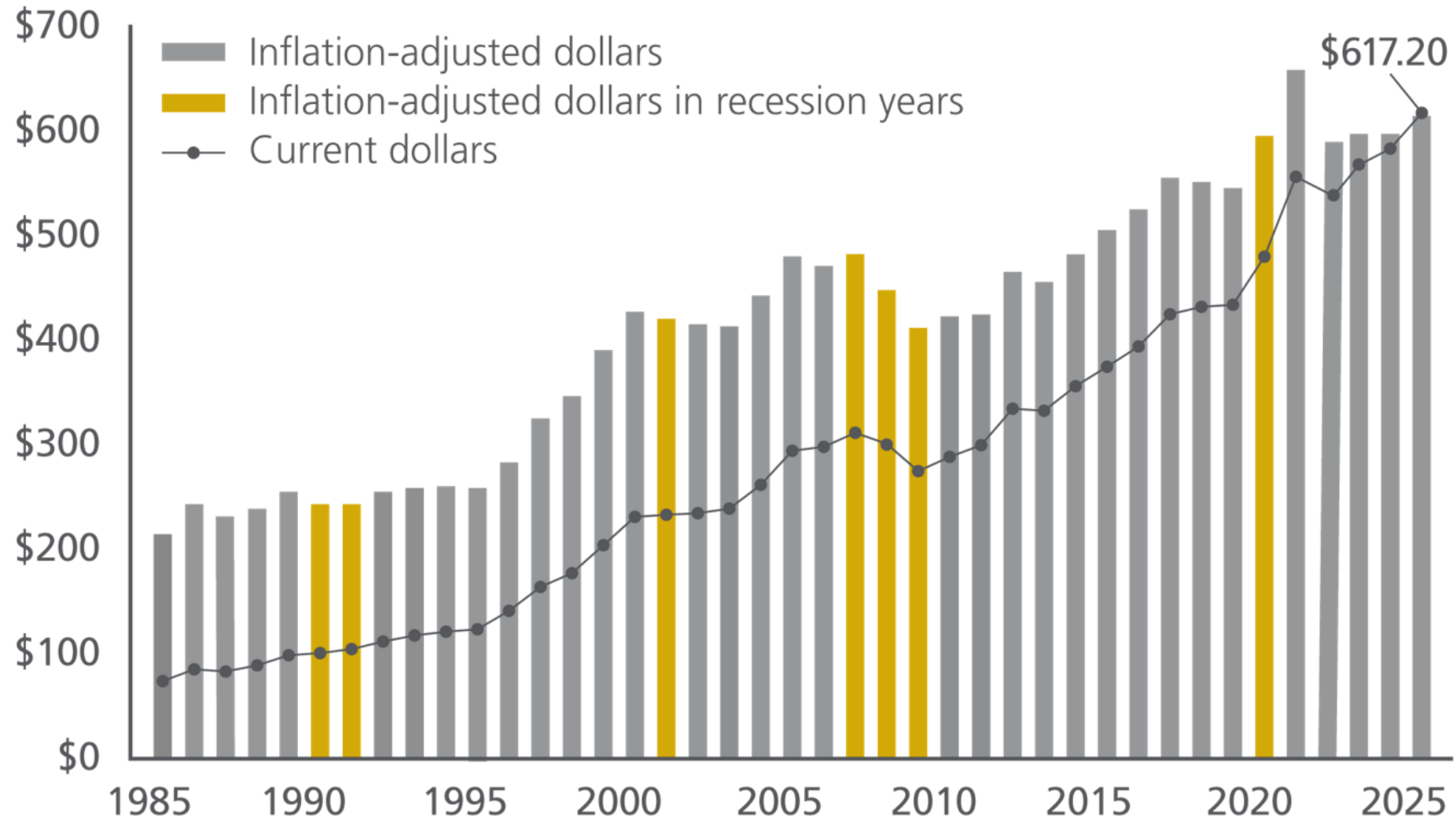
Recipients of Giving: \$617.20 Billion in 2025

5.7%
increase





Total Giving Over 40 Years: 1985-2025





Takeaways from Bank of America Study

Why HNW donors give is very personal:

- Personal beliefs
- Interest in issue
- First-hand experience

Get to know donors

Why HNW donors did not give is important to understand:

- Family needs (45%)
- No connection (25%)
- Did not want to give (23%)
- Was not asked (19%)

Up 20 points in 10 years

All relate to communications



Modest Giving Growth Anticipated to Continue

Charitable giving in the U.S. was projected to grow according to [The Philanthropy Outlook 2024 & 2025](#):

- 4.2% in 2024 → 6.3% actual
- 3.9% in 2025

inflation-adjusted

[BDO](#) projects modest growth

- 2-4% in 2026

The Philanthropy Outlook 2024 & 2025

Presented by CCS Fundraising | Researched and written by
Indiana University Lilly Family School of Philanthropy
March 2024





Building a Culture of Philanthropy



Where is Your Focus?

Fundraising

(dollars)

or

Philanthropy

(donors)



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
- CEO sees self as face of the agency and is 100% committed to fundraising
- All board members make a gift

Transformational!



How to Build a Culture of Philanthropy

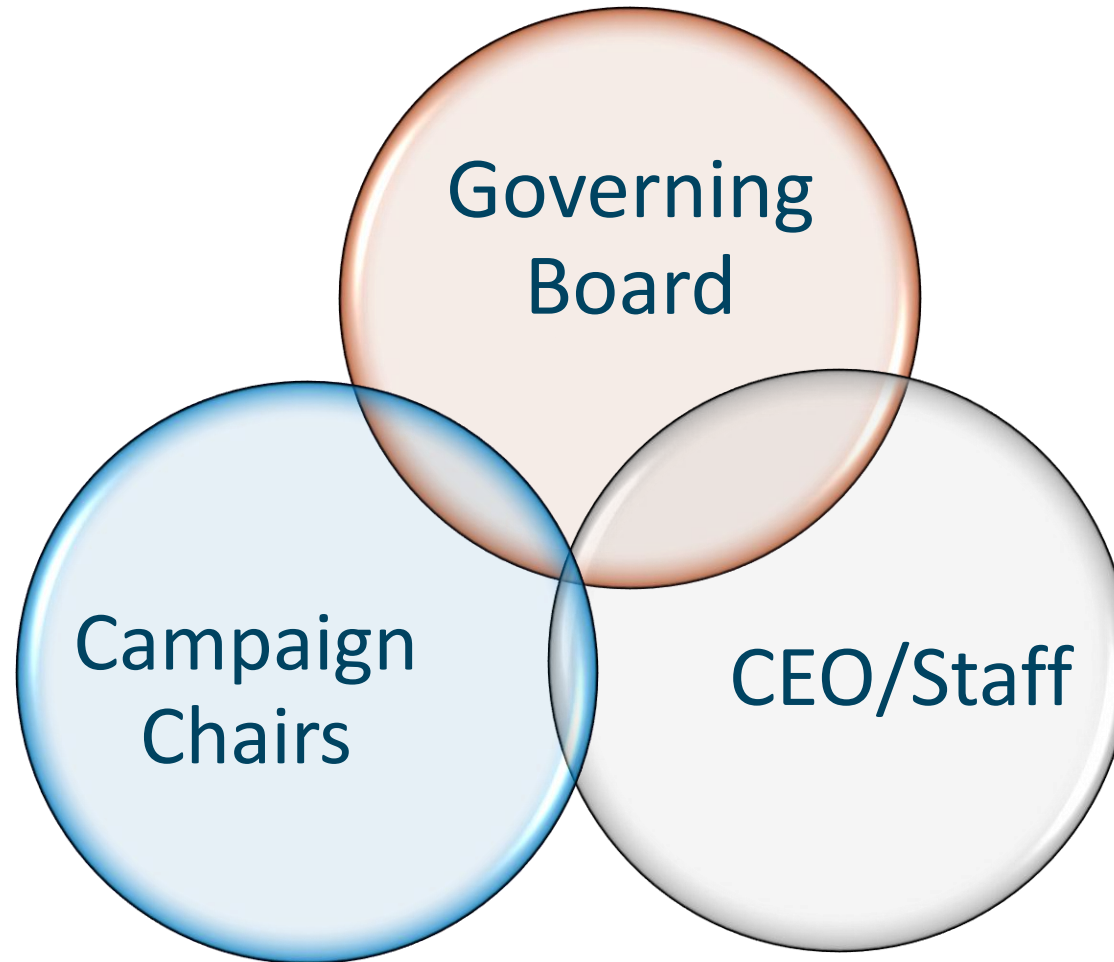
- Make Dev. part of every staff & board meeting (mission moments)
- Build Development with program/service staff input
- Staff and board get to know donors
- Invite donors in (for non-FR gatherings)
- Frequent updates on Development to donors, board and staff
- Celebrate successes such as 100% board giving or new gifts
- Create personalized impact reports for top donors with team input
- Share stories of impactful gifts in various departments



Roles in Philanthropy



Leadership Roles in Philanthropy





Board's Role 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!



Staff Role in Philanthropy

- **Be prepared** and organized
- **Be sensitive** to time constraints
- **Be adaptable** to leaders' schedules
- **Be responsive** and supportive – all residents/family are potential donors
- **Be knowledgeable** about relationships/contacts – how to connect giving opps.
- **Be proactive** capture donor details and cultivation strategies in the database

Major campaigns are board-led and staff-supported.

Annual campaigns are staff-led and board-supported.



Exercise:
Ways you can participate in motivating
philanthropy



Components of Philanthropy



Essential Tools to Build Philanthropy



building a
**Philanthropy
TOOLKIT**

- Case for Support
- Leadership
- Donors
- Capacity



#1: Building a 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



Exercise:
What inspires giving at The Pines?



#2: Leadership

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.”

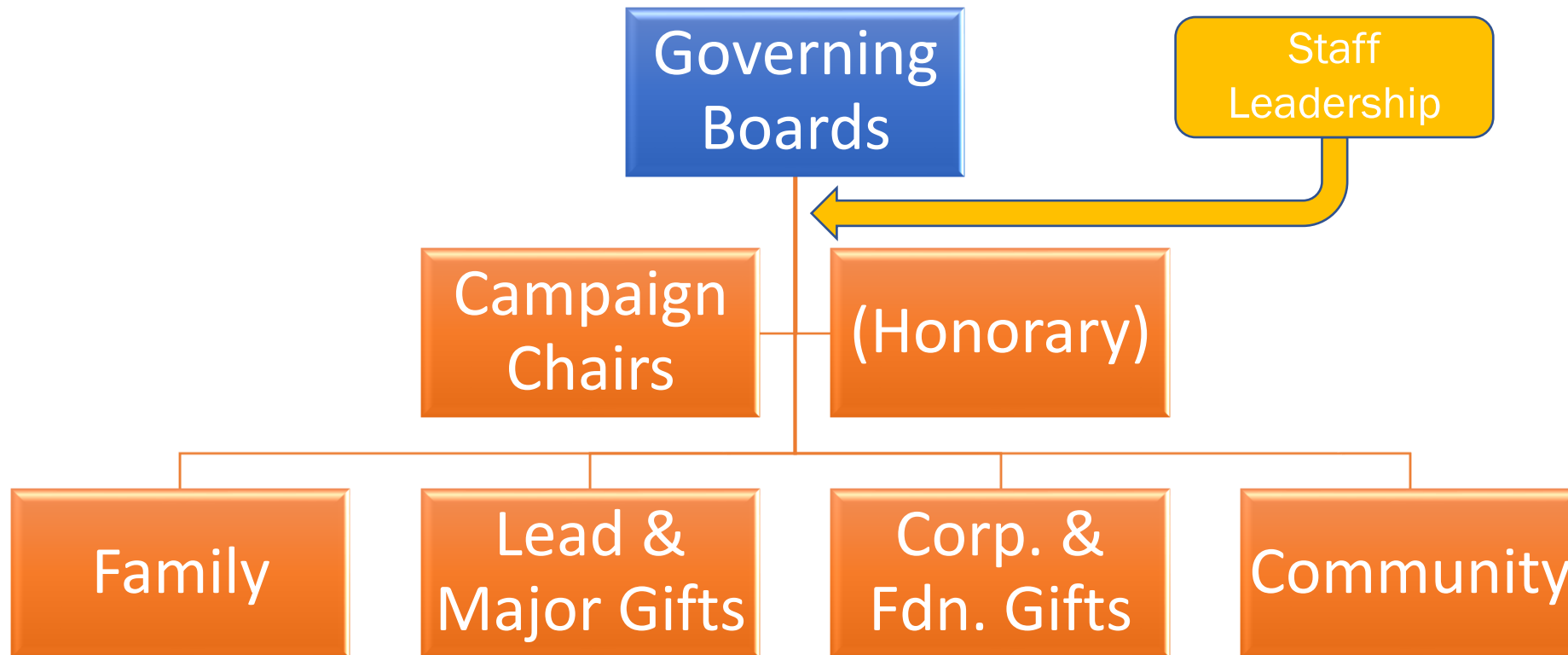


Leadership Enlistment Process





Leadership: Sample Campaign Org. Chart





#3: Donor Engagement

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.*

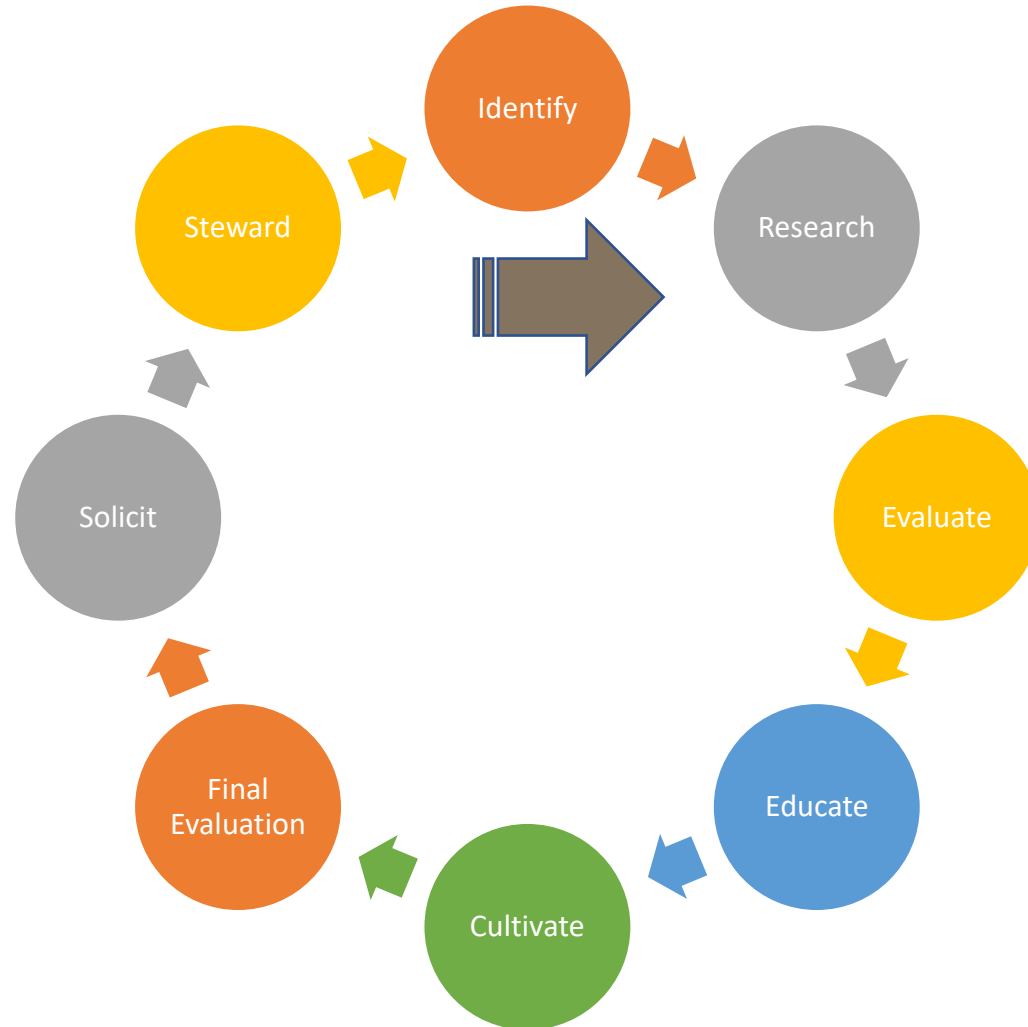
I know you support many great causes.

Can you give anything to help us?

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

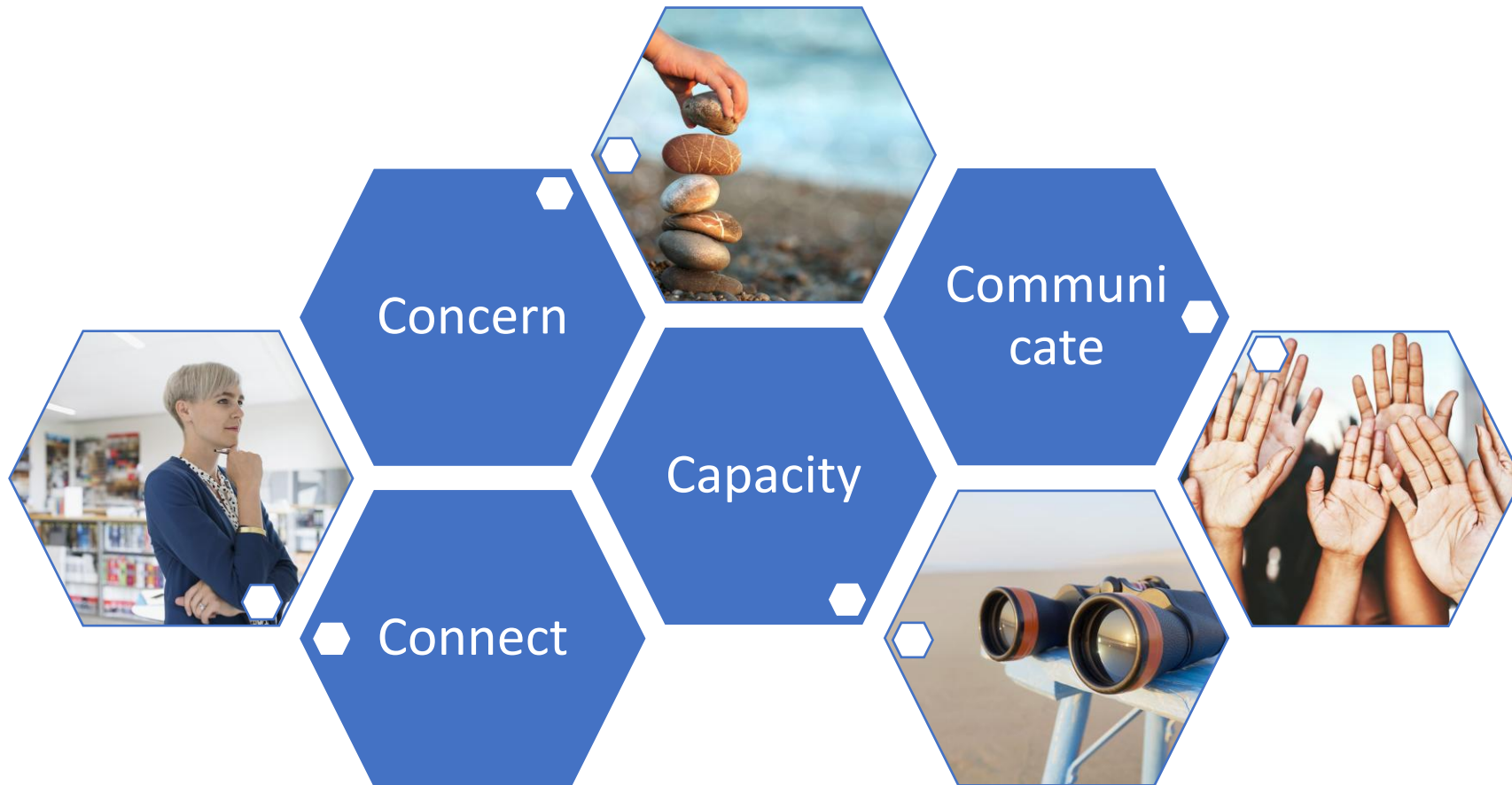


Donor Relations Cycle





Donors: Who Makes a Good Prospect?

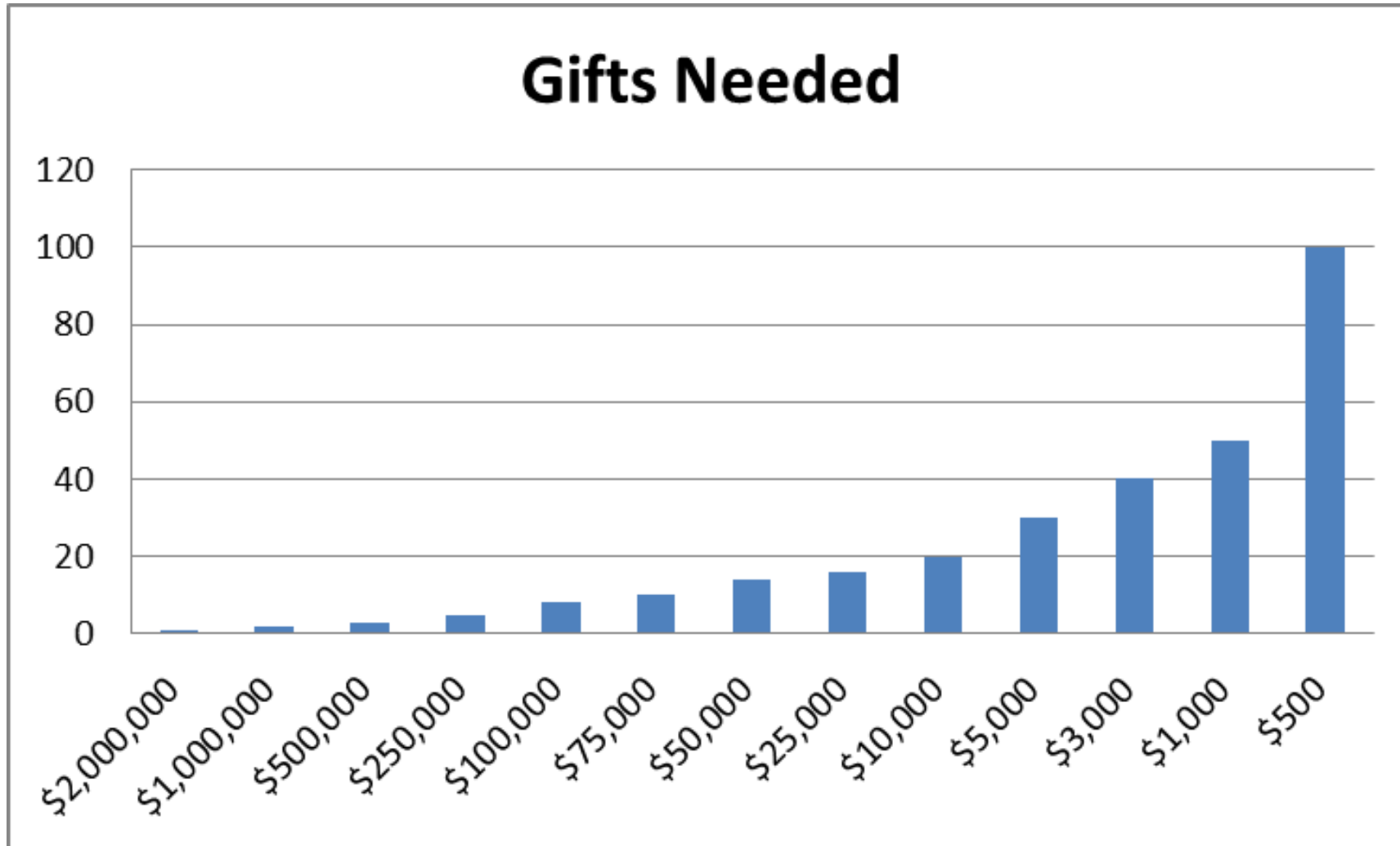




Exercise:
Discuss ways that we all cultivate relationships



Example: \$10 Million Gift Chart



Critical
Considerations:

- Capacity
- Inclination



#4: 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?

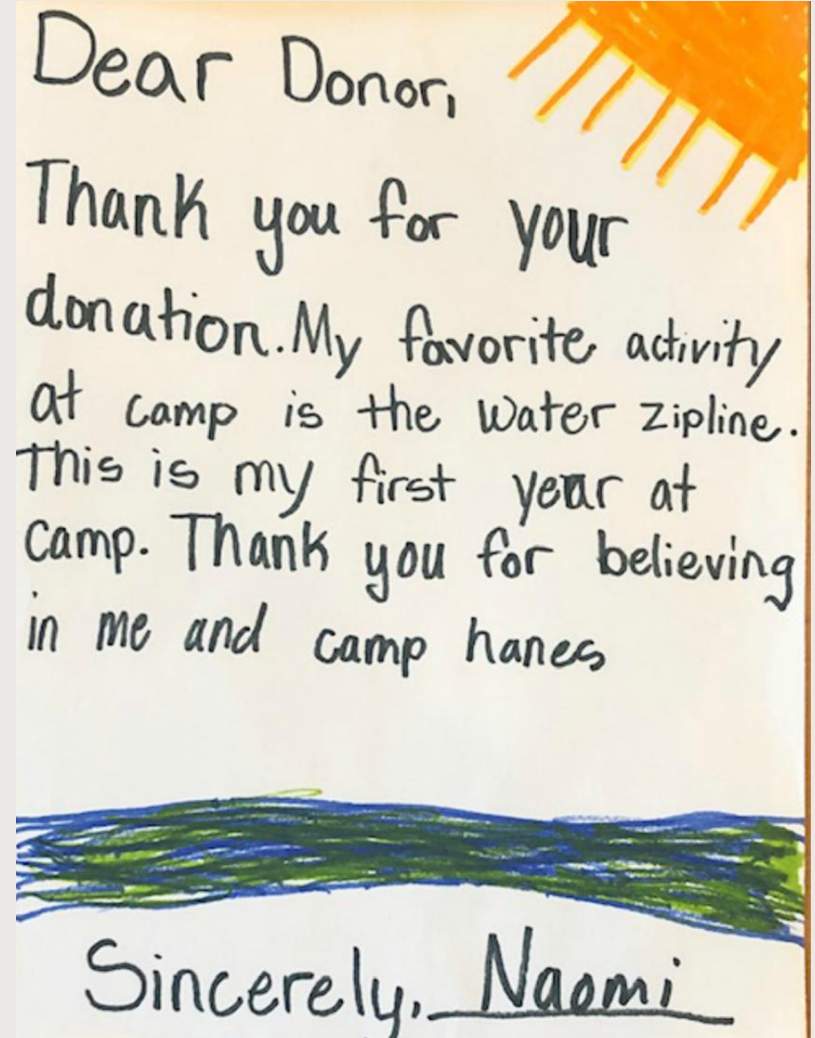
“You must do well to do good.”



Exercise:
How do you communicate about giving without
actually asking?



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: 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
- Appoint a Stewardship Chair = board role

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



Ways Everyone Can Help Say Thank You to Donors:



- Write a personal note; not a form letter
- 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
- Board member thank you calls
- Send photos from events
- Give something made by the organization
- Flowers, plant, book, chocolate... *Share creative ideas*



Use Your WHY for The Pines



Sharing Your Why

Consider talking points for how you would articulate your own story:

- Why you came to work here?
- What keeps you here?
- What motivates you?
- What do you need that philanthropy could provide?
- Why does it matter?



Takeaways & Next Steps

- What did you learn?
- Do you think differently about the role of philanthropy at The Pines?
- What do you want to do with what you learned?



" What did you take away from the meeting ? "



Thank you

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Q&A and Discussion