



# The Science of Fundraising

HOW TO APPLY BEST AND 'BETTER' STEWARDSHIP PRACTICES TO DONOR RELATIONSHIPS

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Pursuant

August 9, 2023

# What We'll Cover.

- The Philanthropic Landscape
- Blending the ART & SCIENCE of Donor Relationships
  - Pillars of Donor Relationship program
  - Moves Management
  - Storytelling & Stewardship
- “Best” vs. “Better” Practice
- Putting it into Practice: CASE STUDIES



# The Philanthropic Landscape





**42.6%**

**DONOR  
RETENTION**

**3.4%**

**DECREASE  
IN GIVING**

# In 2022, philanthropy decreased 3.4% to \$499B

## Just over 10% adjusted for inflation

### PHILANTHROPIC GIVING

Overall **decrease of 3.4%**.  
Only the 4th time in 40  
years giving declined.

### CATEGORY GIVING

Foundation, Corporations,  
and bequest giving grew  
2.5%-3.5%. **Individual  
giving declined by 6.4%**.

### GIVING FROM EXCESS

Giving as a portion of  
disposable income **dropped  
to 1.7%**; the lowest amount  
since 1982.

Giving USA Report, 2023

# Sector performance in 2022 illustrates rebound giving from pandemic



International Affairs

**Up 10.9%**

Foundations

**Up 10.1%**

Religion

**UP 5.2%**

Health

**UP 5.1%**

Arts, Culture, Humanities

**UP 2.9%**



Public Society Benefit

**DOWN 8.4%**

Education

**DOWN 3.6%**

Environment/Animals

**DOWN 1.6%**

Human Services

**DOWN 0.6%**

# CHURCH GIVING

## AVERAGE DONATION

On average, donors have given more post COVID by about 10%



# CHURCH GIVING

## MEDIAN DONATION



### Median Donation

The median gift amount among all donations received in the trailing 6 months.

9/1/2019 - 2/28/2020

Pre-Covid

\$100

9/1/2020 - 2/28/2021

1 year later

\$100

9/1/2021 - 2/28/2022

2 years later

\$100

No Change

No Change

The vast majority of donors haven't adjusted their giving.



# CHURCH GIVING

## LARGE DONATIONS

Big donors gave more immediately after Covid (1 year later) and are now giving 20% more than they were before.



### Average BIG Gift Amount

We took the total number of big gifts (>\$10K) divided by the total amount given in the trailing 6 months.

9/1/2019 - 2/28/2020

Pre-Covid

\$20K

9/1/2020 - 2/28/2021

1 year later

\$21.7K

9/1/2021 - 2/28/2022

2 years later

\$24.1K

↑ \$1.7K(8%)

↑ \$4.1K(20%)



# CHURCH GIVING

## UNIQUE DONORS

On average, churches **lost 12%** of their donor base the first year after Covid, and they have yet to fully recover.



# Generational Giving Trends

GIVING TRENDS 2016 vs. 2022



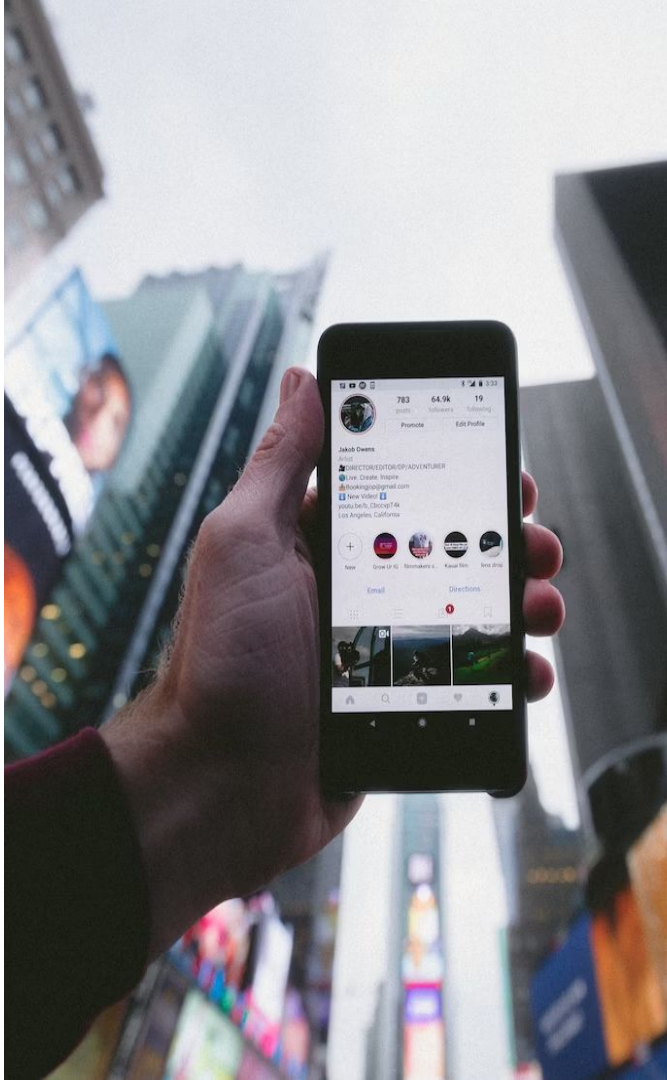
Giving **declined** across all generations including:

- **41% Gen Xers**
- **-16% Boomers**



Giving **increased** across all generations including:

- **135% Millennials**
- **51% Gen Xers**
- **98% Boomers**



## Why is this...

- Is our website mobile optimized?
- How many clicks to donate?
- Should we ask as part of our worship?
- Are we delivering an omnichannel experience?

**Are we walking with our donors?**

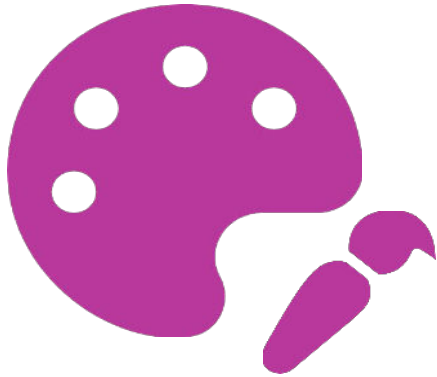


## Building a Meaningful Donor Journey

- Identification
- Discovery
- Engagement
- Invitation
- Stewardship

# BEST PRACTICE

The Art & Science of Major Gift Fundraising.



**ART**



**SCIENCE**



# 5 PILLARS

## OF PHILANTHROPY PROGRAMS

# PHILANTHROPY

## The Five Pillars.

1

DONOR  
ASSIGNMENTS

Are the highest  
capacity & most  
engaged  
donors/prospects  
assigned?

Are “portfolios”  
reasonably sized?

2

CONNECTION

Are all  
donors/prospects  
in portfolios being  
connected with in  
meaningful ways?

3

MOVEMENT

Are prospects  
being moved  
forward at an  
appropriate pace?

4

SOLICITATION  
LEVELS

Are we making  
the right ask (and  
ask amount)  
relative to  
capacity,  
attachment,  
readiness?

5

CLOSE RATE

Are we closing  
solicitations at an  
appropriate pace?



# PROSPECT ASSIGNMENTS.



1

## PROSPECT ASSIGNMENTS

Are the highest capacity and most engaged prospects assigned?

Are portfolios reasonably sized?

Do we know who are our highest capacity, most philanthropic, and deeply engaged donors and prospects?

Do we have appropriate resources and strategies in place to manage them?

# PROSPECT ASSIGNMENTS.

1

PROSPECT  
ASSIGNMENTS

Are the highest  
capacity and most  
engaged prospects  
assigned?

Are portfolios  
reasonably sized?

## What's the “right” size for a major gifts portfolio?

### Variables to Consider

- Type of prospects
- Regional distribution
- Complexity of ask
- Donor expectations/preference
- Portfolio maturity

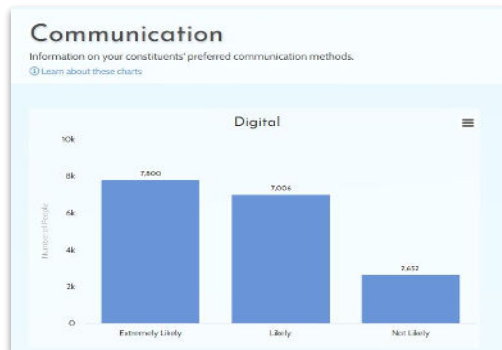
The screenshot shows the GivingDNA Platform interface. At the top, there are navigation tabs for 'Segments', 'Dashboards', and 'Constituent Info'. Below the navigation, the main content area is titled 'GivingDNA Portfolio'. It contains a table with the following data:

Gift Officer	Portfolio Size	YTD Revenue	Annual Goal	Retention
Kristin Priest	215	\$387,408.91 <small>vs 21,52%</small>	\$500,000	36.49% <small>vs 28.5%</small>
Leah Davenport	113	\$537,167.80 <small>vs 7.43%</small>	\$500,000	35.48% <small>vs 35.48%</small>
Becca Gregory Sogovia	107	\$326,213.39 <small>vs 67.18%</small>	\$1,000,000	54.29% <small>vs 54.29%</small>
David Stanton	117	\$585,662.25 <small>vs 41.4%</small>	\$1,000,000	43.24% <small>vs 43.24%</small>
Ryan Carpenter	221	\$18,516.62 <small>vs 76.3%</small>	\$500,000	73.27% <small>vs 73.27%</small>

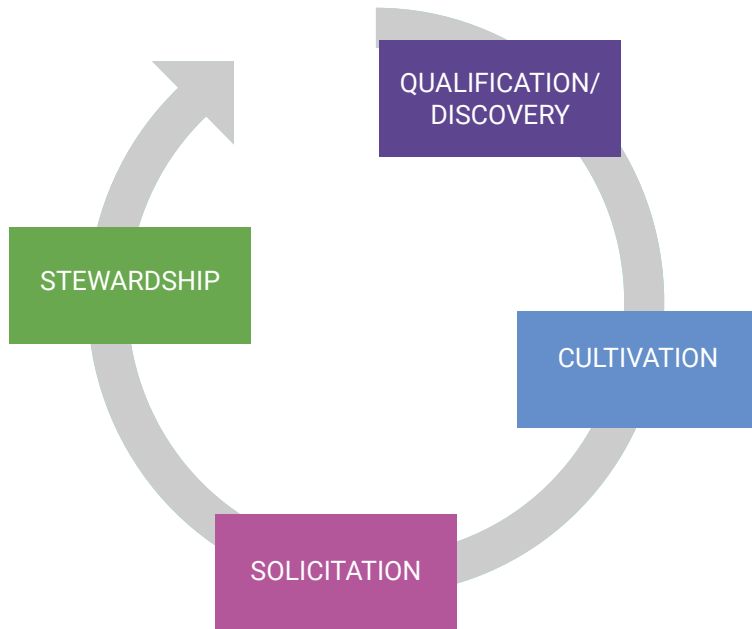
# CONNECTION.

Are all prospects within portfolios receiving meaningful engagement or just our “top 20”?

Do we have insight into the method, frequency and timing of their preferred interactions with us?



# MOVEMENT.



3

MOVEMENT

Are we moving prospects forward at a reasonable pace?

How long do our donors typically stay in each stage?

Where are donors getting “stuck”?

# SOLICITATION LEVEL.

4

SOLICITATION LEVELS

Are our asks at the right level relative to capacity and attachment?

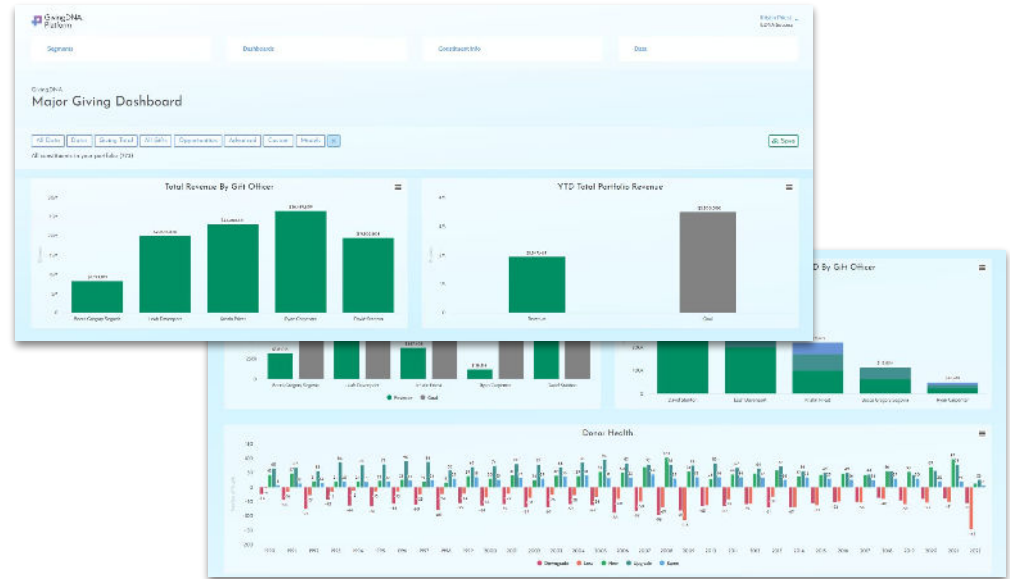
Are the gifts we solicit in line with giving capacity, inclination, and donor interests?

Do we know how they prefer to give outside their relationship with us?



# CLOSE RATE.

Are we closing open invitations to give at an appropriate pace?



5

CLOSE RATE

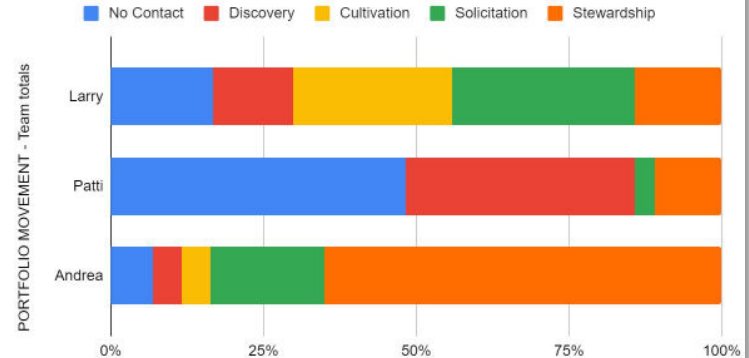
Are we closing solicitations at an appropriate pace?

# PLANNING & MONITORING.

LARRY PORTFOLIO					
FIRST	LAST	Jan-March	April-June	July-Sept	Oct-Dec
		Discovery	Discovery	Discovery	Discovery
		Cultivation	Solicitation	20,000	20,000
		Discovery	Discovery	Discovery	Discovery
		Discovery	Discovery	Discovery	Discovery
		\$10,000	\$10,000	\$10,000	\$10,000
		\$10,000	\$10,000	\$10,000	\$10,000
		\$10,000	\$10,000	\$10,000	\$10,000
		Discovery	Discovery	Discovery	Discovery
		Discovery	Discovery	\$10,000	\$10,000
		Discovery	Discovery	\$10,000	\$10,000
		Discovery	\$10,000	\$25,000	Stewardship
		Discovery	\$10,000	\$10,000	\$10,000
		Discovery	\$10,000	\$25,000	Stewardship
		Discovery	\$10,000	\$10,000	\$10,000
ck		Discovery	\$10,000	\$10,000	Stewardship
		Stewardship	Stewardship	Stewardship	Stewardship
		Stewardship	Stewardship	Stewardship	Stewardship
		\$10,000	\$10,000	\$4,000	\$1,000
		\$10,000	\$10,000	\$5,000	Stewardship
		\$10,000	\$5,000	\$2,500	\$2,500
		\$10,000	\$5,000	\$2,500	\$2,500
		\$50,000	\$25,000	Stewardship	Stewardship
		\$25,000	\$5,000	\$2,500	Stewardship
		Solicitation	Stewardship	Stewardship	Stewardship
		\$50,000	\$50,000	\$10,000	Stewardship
		No Contact	Discovery	Discovery	Discovery
		No Contact	No Contact	No Contact	No Contact
		No Contact	No Contact	No Contact	No Contact

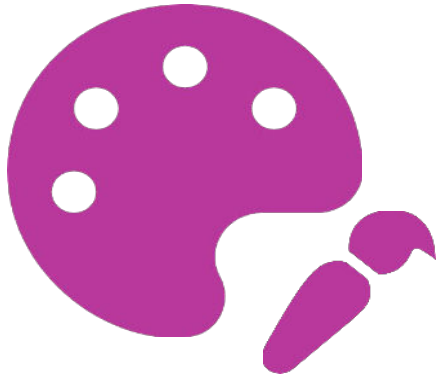
How are we planning for and monitoring the donor experience?

No Contact, Discovery, Cultivation, Solicitation and Stewardship



# “BETTER” PRACTICE

The Art & Science of Major Gift Fundraising.



**ART**



**SCIENCE**

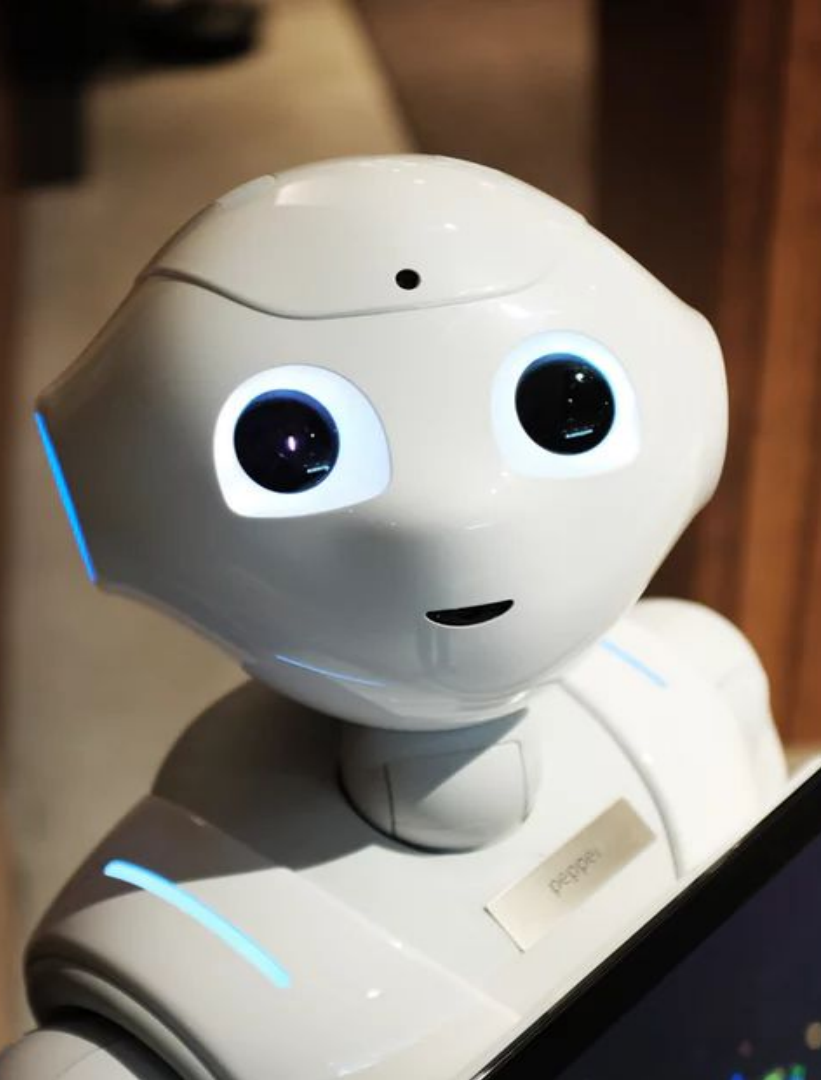




# Moves Management

Moves management is the process by which a prospective donor is moved from cultivation to solicitation.

**“Moves” are the actions an organization takes to bring in donors, establish relationships, and renew contributions.**



# Moves Management

- Create a strategic donor journey
- Test the “Six Rights”
- Deliver appropriate solicitations
- Monitor for full portfolio coverage
- Ensure meaningful experiences



# Meaningful Experiences

## EXAMPLES

- Philanthro-travel or Guided volunteer experience
- ‘Sneak peek’ tour
- Mini concerts/lectures
- Thank you journey
- Breakfast with member of leadership
- Private briefing by subject matter expert
- “Jeffersonian Dinner”
- Other ideas? What’s working



READ LESS MINDS

ASK MORE QUESTIONS

# Powerful Questions Through the Donor Journey.

- Relationship Building
- Organization Discovery
- Cause & Values Identification
- Vision Casting
- Ask Building
- Making the Ask





# Relationship Building

- One of the most underutilized portions of the donor visit.
- Begin personalization of the case & language mirroring

# Relationship Building Questions.

What made you decide to pursue a career in \_\_\_\_\_?

How has \_\_\_\_\_ impacted your work/business?

How has it impacted your family?

Do you have any summer plans?

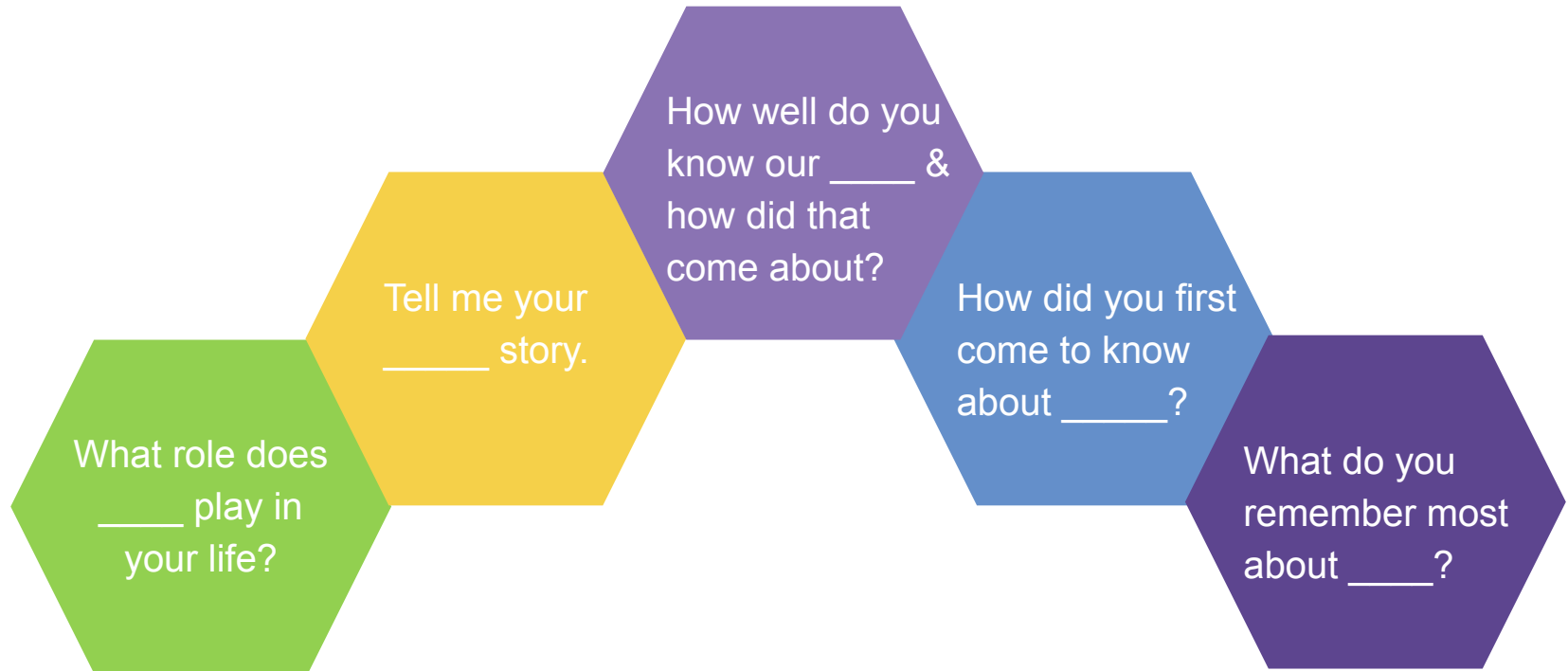


# Organization Discovery.

- Does historical data translate to future interest?
- Without this, we may strengthen the wrong giving muscle.



# Organization Discovery Questions

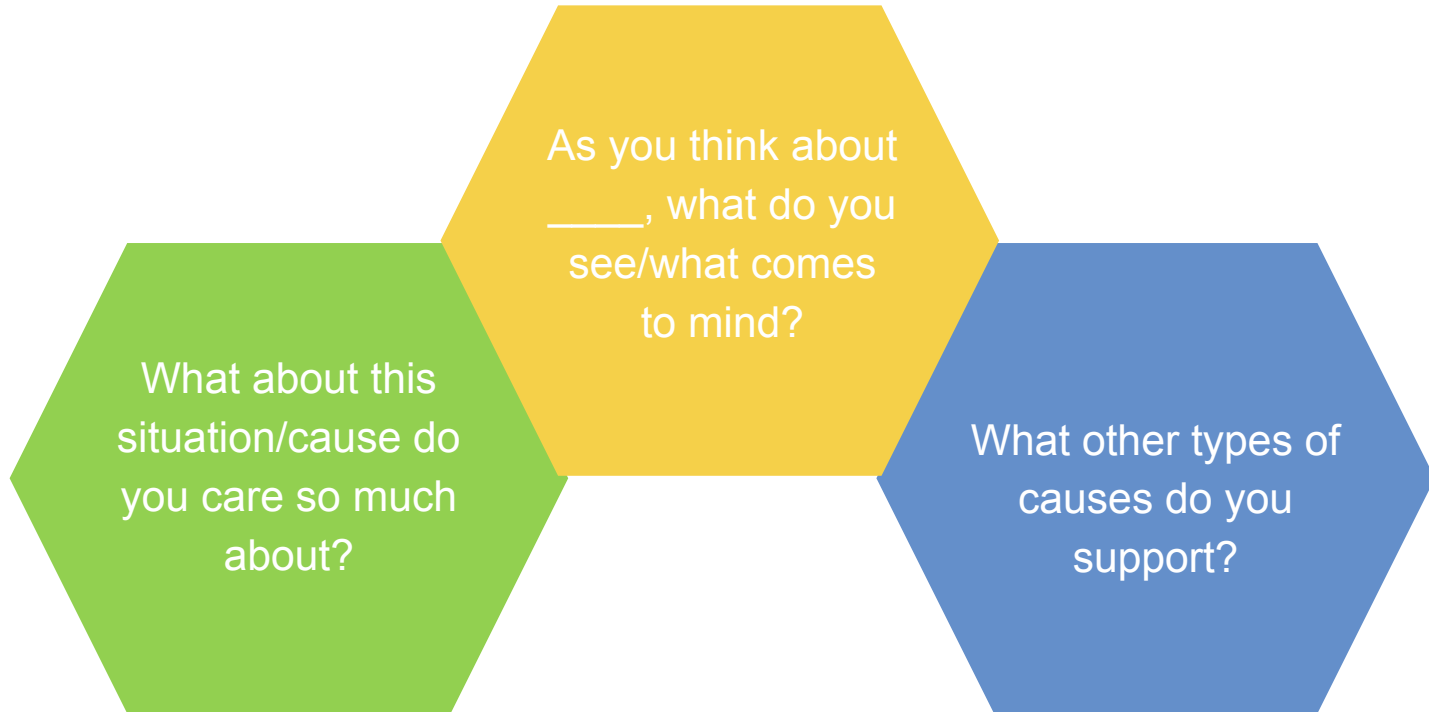




## Cause & Values

- Who are your major donors as 'self actualized' philanthropists?
- Move past their connect to you to identify their greatest passions.

# Cause & Values Questions.





# Vision Casting

- Allows your donors to see themselves as central to the solution/opportunity.
- Key to moving donors from a 'thank you' gift to becoming a charity of choice.

# Vision Casting Questions.

As you think about  
(\_\_\_\_ goals), how  
do you see this  
aligning with (values  
expressed)?

What have you  
heard about our  
vision for the future  
and what are your  
impressions?

In your view, what is  
the greatest impact  
\_\_\_\_\_ can have in  
the community,  
country, or world?



# Ask Building Questions

- Transition from a discussion of the vision to a discussion of the gift.
- Creates space for donors to give permission to ask.

# Ask Building Questions.

What would you like to accomplish with your money that is meaningful to you?

As you think about your philanthropic priorities for the year, where might \_\_\_\_\_ fit within that?

How would you like to be asked for a gift?



## Making the Ask

- The exception to the yes/no rule
- Identify who should make ‘the ask’
- At the end of the day, it’s about creating donor confidence



# Ask Questions.

You mentioned wanting to see \_\_\_\_\_ accomplished. Would you consider (describe what will be accomplished) through a gift of \$\_\_\_\_?

Would you consider making a special gift of \$\_\_\_\_ to partner with us in \_\_\_\_\_ so that \_\_\_\_\_ can be accomplished?

Would you consider a gift of \$\_\_\_\_\_ for \_\_\_\_\_?

**The Most Powerful Questions in our toolkit?**

**The follow-up!**



# The Power of Great STORYTELLING

## More ideas

### Do one thing at a time

The brain is a sequential processor, unable to do two things at the same time. Businesses and schools have multitasking, but research clearly shows that it reduces performance and increases mistakes. Try creating an interruption-free zone during the day—turn off your email, phone, and social-media sites, and whether you get more done. If you have trouble untagging yourself, download software that blocks your access to certain websites for a certain amount of time that you specify.

### Divide presentations into 10-minute segments

Remember my students who said they got bored in lectures? The 10-minute rule is a simple idea that can help you create presentations people can pay attention to. Here's the rule: The maximum amount of time that a person can pay attention to a lecture, for which I was named "The 10-minute Teacher of the Year" (awards are given to the most "targeted" teachers in the world), is 10 minutes.

Think about that every time you give a lecture. If you know that every 10 minutes of a lecture would be a loss of attention, and that each segment would last only 10 minutes, you'll naturally want to make each segment cover a single core concept, and you'll naturally want to explain it in enough detail, and you'll naturally want to explain it in a way that's interesting and relevant to your audience. You'll naturally want to explain it in a way that's interesting and relevant to your audience. You'll naturally want to explain it in a way that's interesting and relevant to your audience.

Each class was 50 minutes, so I could easily burn through five large concepts in a single period. I would use the other nine minutes

in the segment to provide a detailed description of that single general concept. The trick was to ensure that each detail could be easily linked back to the general concept with minimal intellectual effort. I would naturally pause to explicitly explain the link. This is like the link between the two things between stuffings. In addition to walking through the key points at the beginning of the class, I sprinkled liberal reminders of "between we've" throughout the hour.

The problem for the audience was from trying to multitask. If the instructor was talking about the presentation, the audience is trying to multitask. If the instructor is talking about the presentation, the audience is trying to multitask. If the instructor is talking about the presentation, the audience is trying to multitask.

After 10 minutes had elapsed, I had to stop. Why did I construct my lectures that way? I had only about 600 seconds to give a lecture, and the next hour would be useless. And I had to stop something after the 601st second to "buy

time for lunch. After 10 minutes, the audience's attention is getting close to zero. If something isn't done quickly, the audience will be in successive bouts of an effort to pay attention. They need more information of the same quality. They need a highly relevant cue that breaks them from their current thought, making the information stream seem disrupted, unorganized, and paralyzing. They need something so compelling that they break through the 10-minute barrier—something

# STORYTELLING

## THE STORY SPINE

Once upon a time... *(intro the “before” state and the protagonist)*

And every day...

Until one day... *(tell the point where things changed, crisis/issue occurred)*

And because of that... *(details around what else occurred due to the crisis)*

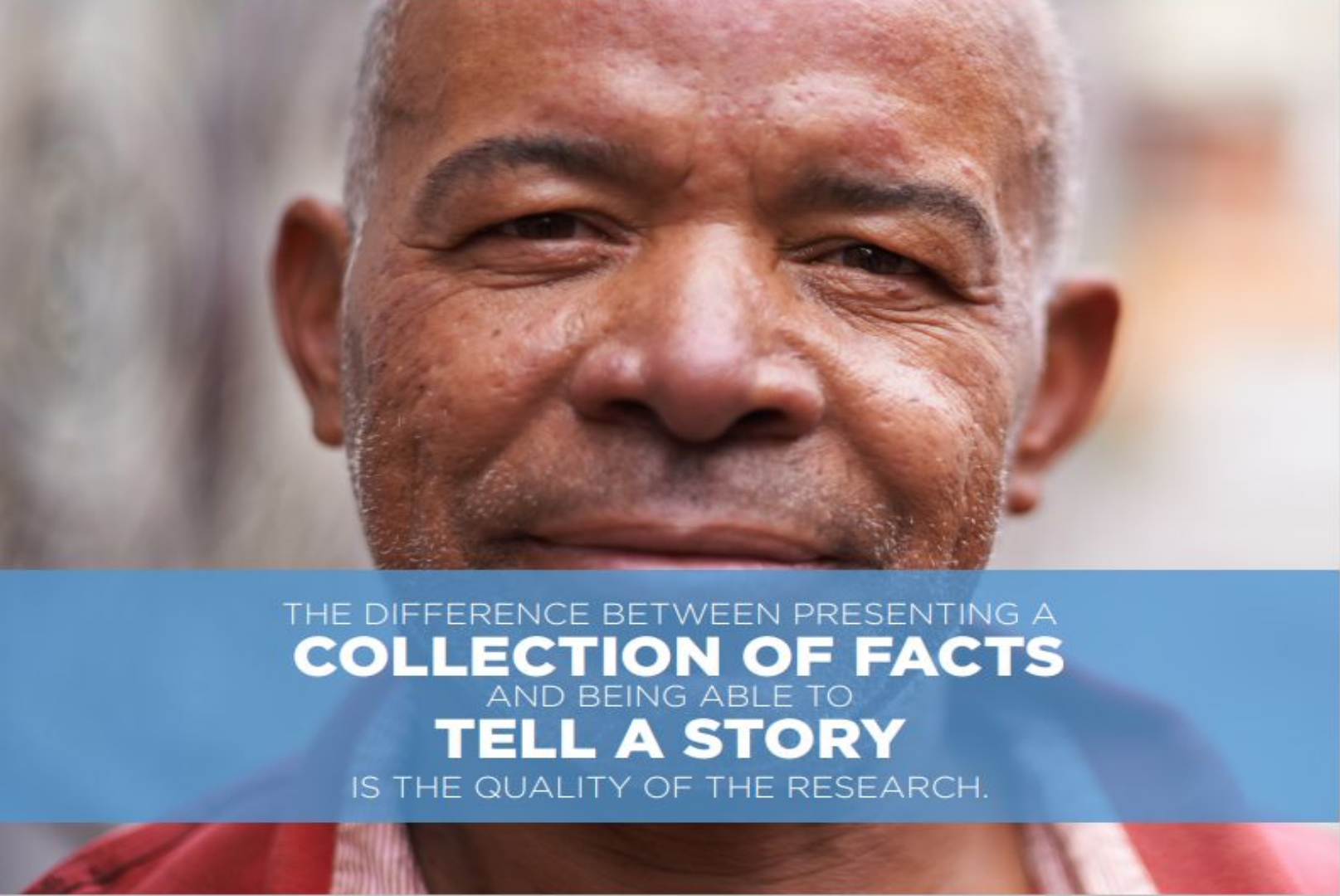
And because of that...

Until finally ... *(the progress from “before” state, to crisis, to seeking help, to solution)*

And since that day... *(new reality)*

And the moral of the story is... *(the wider truth or application)*





THE DIFFERENCE BETWEEN PRESENTING A  
**COLLECTION OF FACTS**  
AND BEING ABLE TO  
**TELL A STORY**  
IS THE QUALITY OF THE RESEARCH.

# STORYTELLING

## HERE IS A COLLECTION OF FACTS

Every 9 seconds in the U.S. a woman is assaulted or beaten, and studies suggest that up to 10 million children witness domestic violence annually. Jim came from just such an abusive home, and it put him on a path of depression and drug abuse that ended in homelessness.

Fortunately, he found ABC Rescue Mission and the full range of emotional, physical, and spiritual help that you support. Through counseling, he was able to overcome his addiction and the scars of his past.

Thanks to your generosity and his hard work, he's been sober for three years and just got a promotion at his job!

## HERE IS THE CREATION OF A STORY

Twelve-year-old Jimmy sat on the sofa, waiting for his stepfather to come home. He slid his hand under the cushion to make sure the gun was still there. It was.

When his stepfather got home, it was just what Jimmy expected. He went into the kitchen, where Jimmy's mother was making dinner, and an argument broke out. In moments, Jimmy's stepfather was holding Jimmy's mother's face in a pot of boiling soup. His mom was already covered in bruises from the other times, but she wouldn't leave him. Jimmy was afraid one day his stepfather would kill her.

So Jimmy shot him.

Jimmy didn't kill his stepfather, but he ended up in a children's home, still angry and hurting from all he'd seen—and his mom was still with that man. All too soon, Jimmy was experimenting with ways to numb the pain. Marijuana turned to heroin, and heroin to meth, as he kept searching for a way to forget the past.

He met a woman who wanted to help, and they married. But every time things got tough he'd turn back to drugs. By the time he was 30, he was homeless, separated from his wife, and wasn't allowed to see his two little boys. It killed Jim to think they might grow up without a loving father, too.

Then one night, he came to ABC Rescue Mission for a meal. He heard about our six-month recovery program and shyly asked if he could join.

Thanks to your support, Jim found exactly the kind of help he'd always needed. His counselor walked through the pain of his past with him, helping him understand and express his feelings. He learned that what happened to his mom wasn't his fault or his responsibility. It was a huge burden lifted. And as Jim's spirit healed, our addiction recovery classes helped heal his body.

If you saw Jim today, you'd hardly recognize him as the same man who came through our doors three years ago. After graduating from the program, he found a steady job and recently received a promotion. Best of all, he and his wife are talking, and he's spending time with his boys. He's determined to give them a stable foundation for the future. That's the kind of transformation you make possible when you partner with ABC Rescue Mission!





DON'T ASK FOR STORIES.  
**ASK QUESTIONS.**

# STORYTELLING

## WHY GOOD STORIES MATTER.

- **Helps set foundation for an inspiring invitation:**
  - Donor support is integral in changing lives through the organization
  - The work of the organization truly matters
  - The organization uses donor support effectively to enact real change
- **Drives sense of timeliness & relevance**
  - Even when stories are similar, details and direct quotes keep them different and relatable
  - Use pictures or videos to complement the story and to make a connection for the reader/viewer





# STEWARDSHIP



# STEWARDSHIP.



## *Simply...*

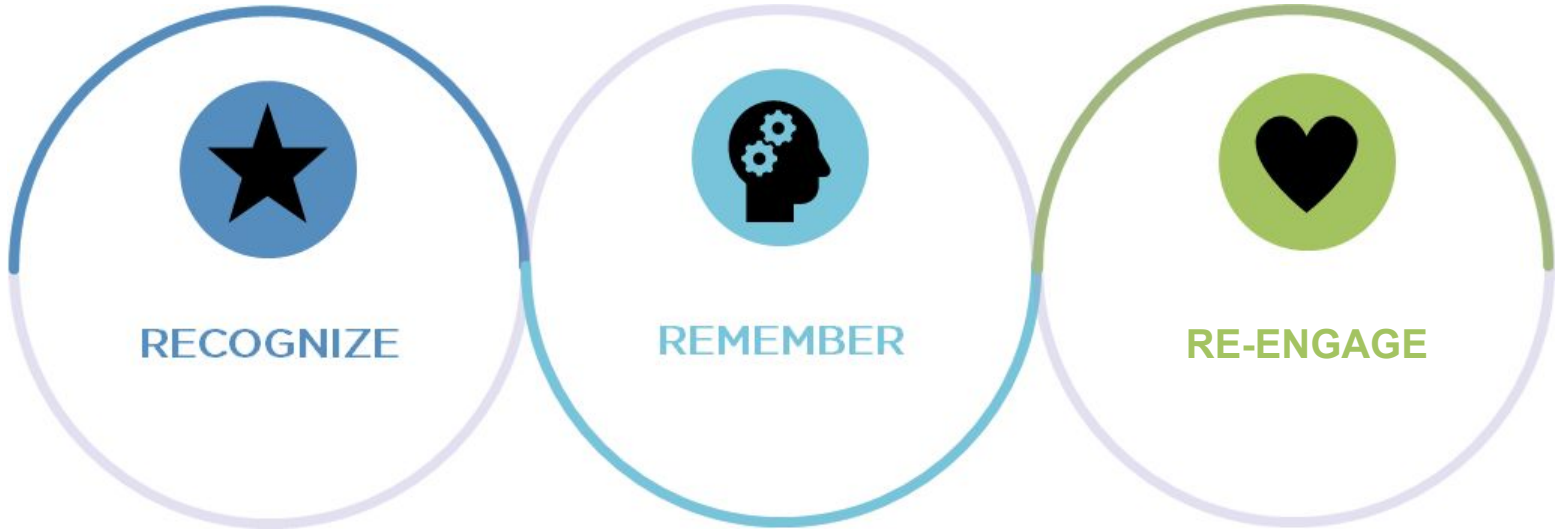
**DONOR STEWARDSHIP IS THE RELATIONSHIP-BUILDING PROCESS THAT BUILDS AFTER A DONOR SUPPORTS YOUR ORGANIZATION.**

## Such as:

- Managing gifts as donors intended
- Updating donors on progress and impact of gifts
- Moving them into a cultivation process
- Keeping them involved in your mission financially AND non-financially



# STEWARDSHIP



RECOGNIZE

their commitment,  
sacrifice, and impact  
on your mission

REMEMBER

to treat them as individuals  
and personalize their  
experience as desired &  
feasible

RE-ENGAGE

through surveys, calls, etc. to  
gain feedback (good or bad) and  
re-engage them in the mission



# WAYS TO MAKE DONORS FEEL LIKE A HERO.

## ■ How to Communicate

- Thank, thank, thank!
- Pivot from organizational-centric to donor-centric language (*you, me, we language*)
- Connect donors directly to impact (*i.e., when you give, you do XYZ vs. you help us do XYZ*)
- Using hyper-personalization
- Transparency about how funds are used
- Offer ways to give/get involved beyond money
- Solicit feedback

## ■ Tools to Demonstrate Impact

- Acknowledgements
- Newsletters with stories
- Video testimonies in service or in email/website/social media
- Impact report
- ThankView or other personalized video message
- Handwritten notes





# CASE STUDIES

**Houston SPCA**  
WELCOME EXPERIENCE

**Washington National Cathedral**  
PIPELINE DEVELOPMENT & MEANINGFUL EXPERIENCES

**Lutheran Hour Ministries**  
PORTFOLIO MANAGEMENT

**Harvest Christian Fellowship**  
INTENTIONAL STEWARDSHIP

# Houston SPCA

## The Challenge

- Limited stewardship of current donors
- No understanding of donor connection
- Anemic major gifts pipeline
- No mid-level program (or resources!)

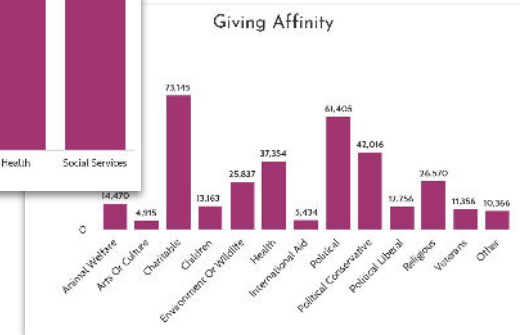
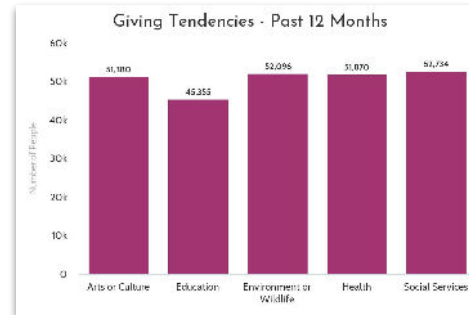
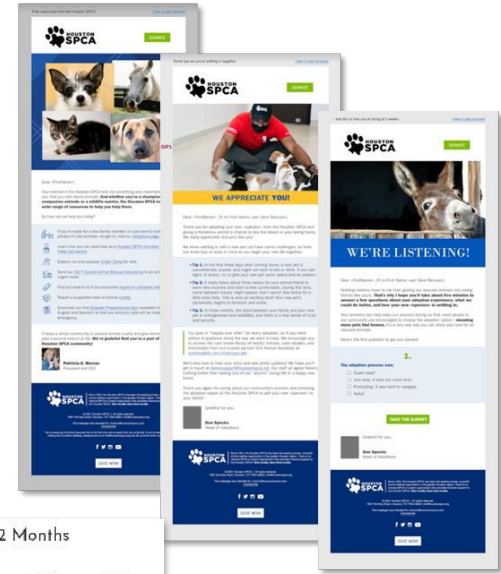


# DISCOVER

*THEIR Case for Support.*

Houston SPCA addresses a wide range of issues.

Leverage tech and donor feedback to **understand donor priorities and specific connections** to and interest in Houston SPCA.



# WELCOME

With relevant, scalable experience.

- Response segmented messaging
- Interest-driven experiences
  - Variable copy
  - Low tech impact videos
  - Topical town hall meetings
  - Virtual tours & curated events
- Top prospects receive 'phone first' outreach

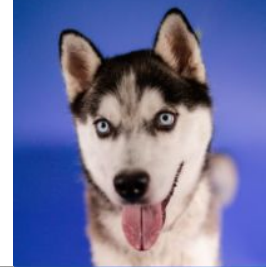
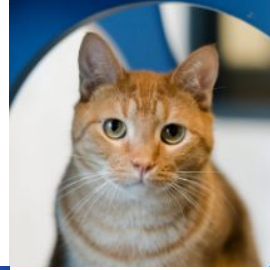




# Houston SPCA

## By The Numbers + Results

- **\$500K** from four families with HPC of \$2,500 annually
- **26.8%** increase in donor engagement
- **\$10k +** increases in giving from dozens of donors



# Washington National Cathedral

## The Challenge

- Inability to engage in person
- No processes in place to manage large influx of new donors
- Need to grow major gifts pipeline
- Limited culture of philanthropy

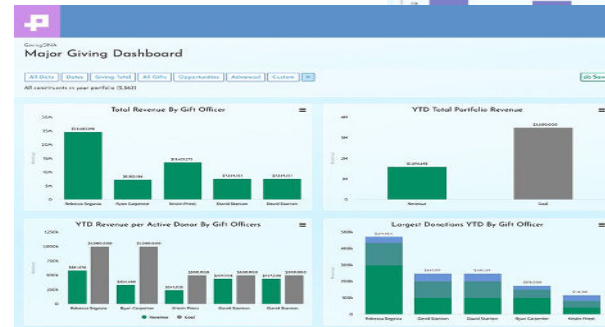
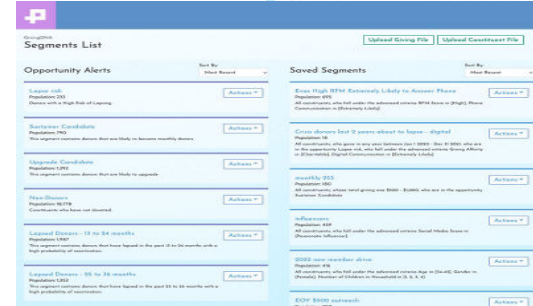
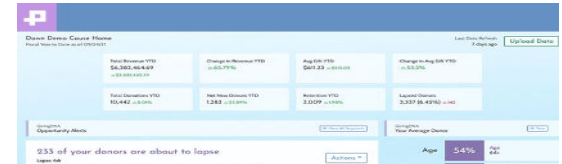


# IDENTIFY & PRIORITIZE

## Best Mid-Level Prospects & Donors.

### Top Prospects

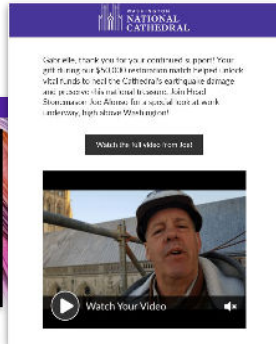
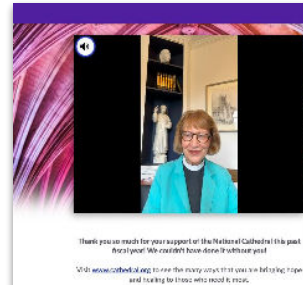
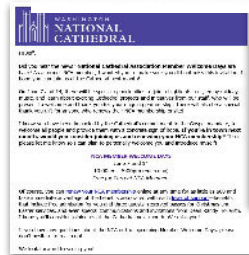
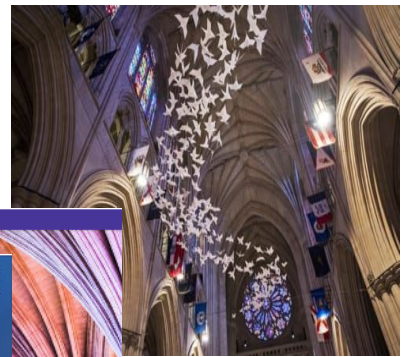
- Giving Frequency
- Engagement Other Than Giving
- Individual Giving Affinity
- Passions and Interests
- Communication Channel Preferences



# ENGAGE

With personalized, preferred experience.

- Honor channel preferences
- Deliver “surprise & delight” moments
- Resource for donors & worshippers seeking deeper experiences
- Create ‘raised hand’ opportunities for donors to self-identify



# Washington National Cathedral

## By The Numbers + Results

- **59% increase** in mid-level donor revenue year-over-year
- Donors personally engaged gave **more than 2x** compared to those not
- **84% increase** in giving YoY from donors personally engaged
- **75% of engagement** occurred prior to gift



# Lutheran Hour Ministries

## The Challenge

- High turnover in mid, major and planned giving staff
- “stale “ portfolios & difficulting engaging donors
- Limited ability to travel
- Unclear donor journeys



# Getting the appointment.

- Phone or email?
- What about voicemail?
- Are donors preferring to text?
- What about advance materials?
- Testing, testing, testing





## VIRTUAL VISITS

The new donor  
'living room'





# Virtual vs. In Person

**Virtual visits better than in-person in many situations**

Qualification: **Phone, Email or Online**

Early Cultivation: **Visit most important** to create shared vision

Mature Cultivation: Visit less important

Solicitation & Close: Trying to visit may actually hurt

**Phone, email, and virtual meetings often more effective in later stages of cultivation**



**AS A RESULT OF  
THIS MEETING...**

# AS A RESULT OF THIS MEETING

## SAMPLE WORKSHEET

### TARGET DONOR OBJECTIVE(S)

---

What (if any) are the short and long-term donor relationship goals? Individual gifts? Access to peer networks? Other?

### AS A RESULT OF THIS MEETING

---

What is the goal of *this* meeting? What will a successful donor visit result in? What will be different or true as a result?

### EXISTING BARRIERS OR INFORMATION GAPS

---

What are the known (and potentially unknown) information gaps that prevents us from taking the next meaningful step towards target objectives? What are our knowledge gaps? What is the donor's gap?

- What do I want the donor to know?
- What do I want the donor to remember?
- What do I need to know?

### KEY QUESTIONS

---

What are the 2-5 specific questions I need to ask to achieve the specific goal(s) of the meeting, solve for information gaps, and affirm our target donor objectives?



# AS A RESULT OF YOUR NEXT MEETING...

## **TARGET DONOR OBJECTIVE(S)**

---

What (if any) are the short and long-term donor relationship goals? Individual gifts? Access to peer networks? Other?

## **AS A RESULT OF THIS MEETING**

---

What is the goal of *this* meeting? What will a successful donor visit result in? What will be different or true as a result?

## **EXISTING BARRIERS OR INFORMATION GAPS**

---

What are the known (and potentially unknown) information gaps that prevents us from taking the next meaningful step towards target objectives? What are our knowledge gaps? What is the donor's gap?

- What do I want the donor to know?
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## **KEY QUESTIONS**

---

What are the 2-5 specific questions I need to ask to achieve the specific goal(s) of the meeting, solve for information gaps, and affirm our target donor objectives?

# Harvest Christian Fellowship

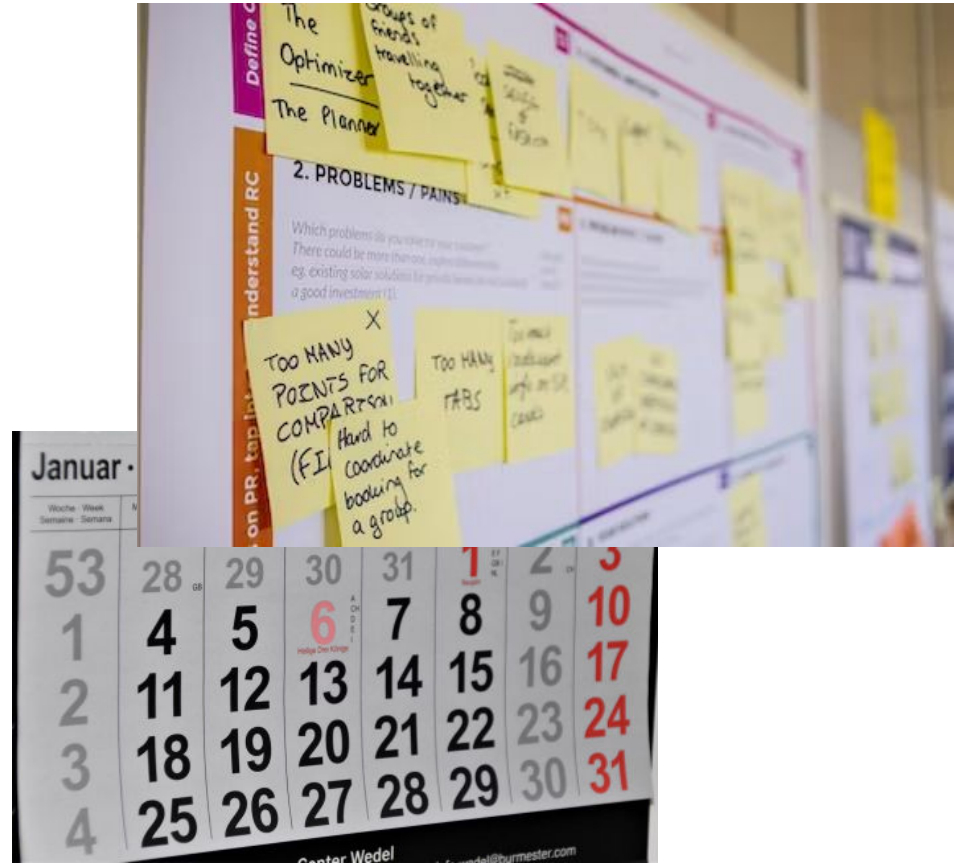
## The Challenge

- Create an intentional, integrated stewardship experience that inspired worshippers to deepen their relationship with Harvest.



# Stewardship Mapping

- Off-site planning retreat
- Integrate internal & external themes
- Coded emphasis: scripture reference, impact, invitation, volunteer opportunities, etc.
- Ensured balanced, relevant, meaningful experience



PROCESS & TRACKING  
STRATEGY

SOFT & HARD COST  
IMPLICATIONS

COMMUNICATION  
CALENDAR



What can you build on *today*?

# Ideas? Questions?





THANK  
YOU.

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# Mid, Major & Legacy Gifts

Growth Strategies for Faith-based nonprofits in 2023.



Establish/refine, set goals, educate leaders... something around creating or building on what they are currently doing



Diversify the Donor Base



Leverage Emerging Technology



Empower Donors to Give How they Choose