



MAJOR DONOR STRATEGY DEEP DIVE

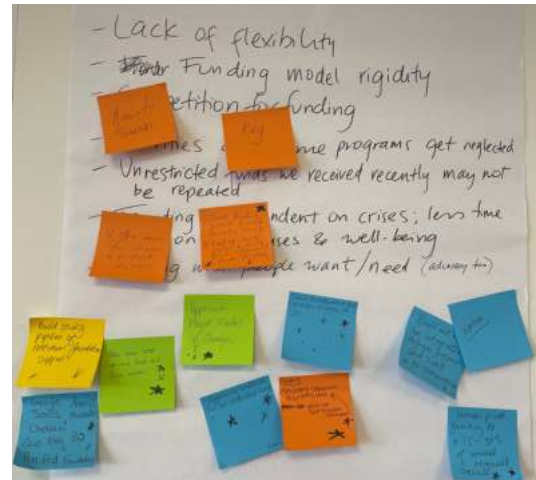
A LITTLE ABOUT WHO WE ARE



WE HELP MISSION-DRIVEN ORGANIZATIONS REMOVE BARRIERS AND REACH THEIR GREATEST POTENTIAL.

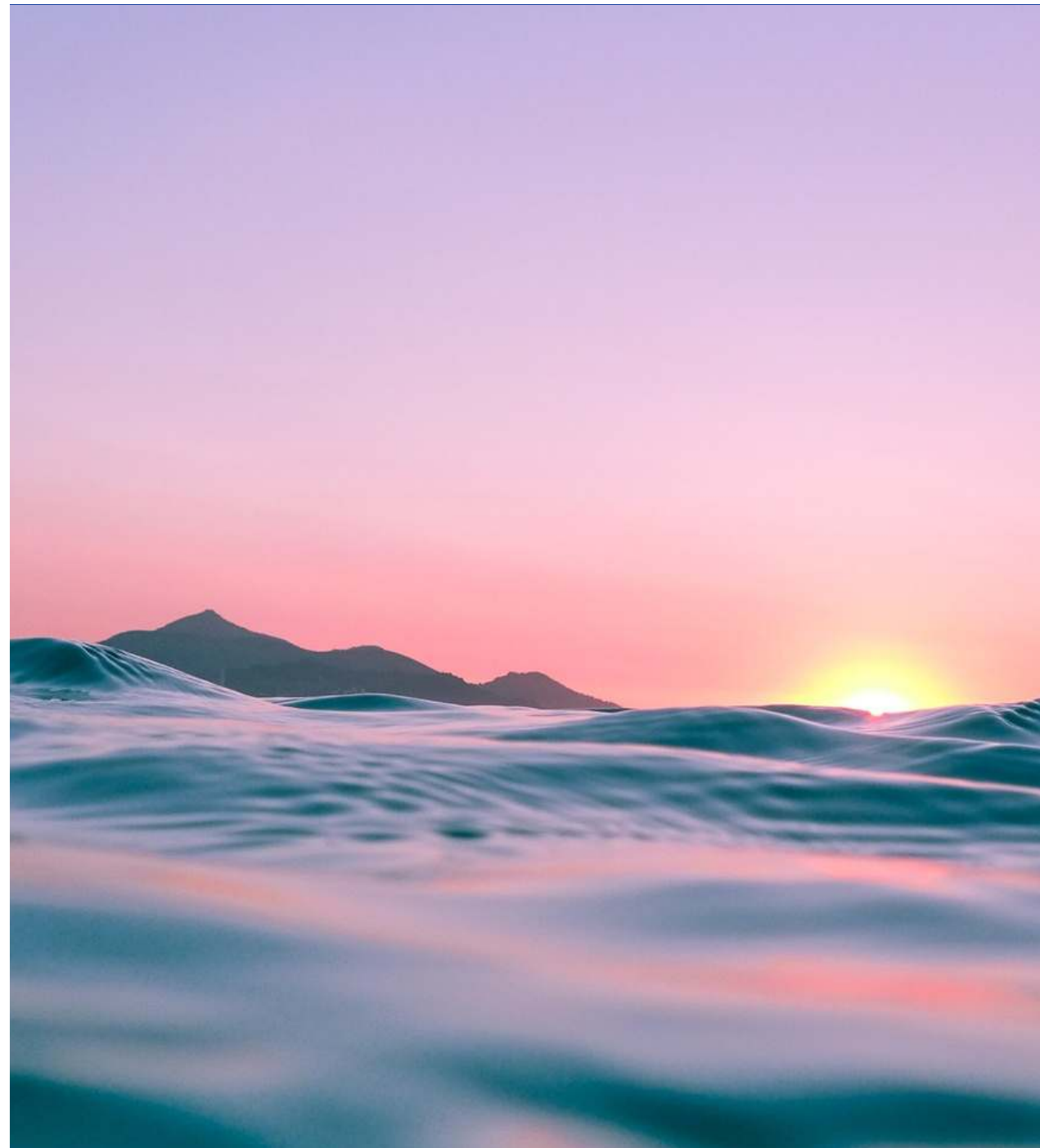
We assist nonprofits with strategy development and implementation, with a particular focus on

capacity building, fundraising strategy, and grants.



IN THE CHAT....

SHARE YOUR
**NAME AND
ORGANIZATION**





TODAY'S AGENDA

- 1 Understanding the benefits of a fundraising plan that prioritizes major donors
- 2 Communicating who you are and crafting a strong pitch for these donors
- 3 Supercharging your strategy by project managing your approach and cultivating major donors over time

HOW DO YOU MAKE A
FUNDRAISING PLAN THAT IS
**TRUE TO WHAT YOU'RE
DOING, REALISTIC GIVEN
THE FIELD YOU'RE IN, AND
LIKELY TO SUCCEED?**



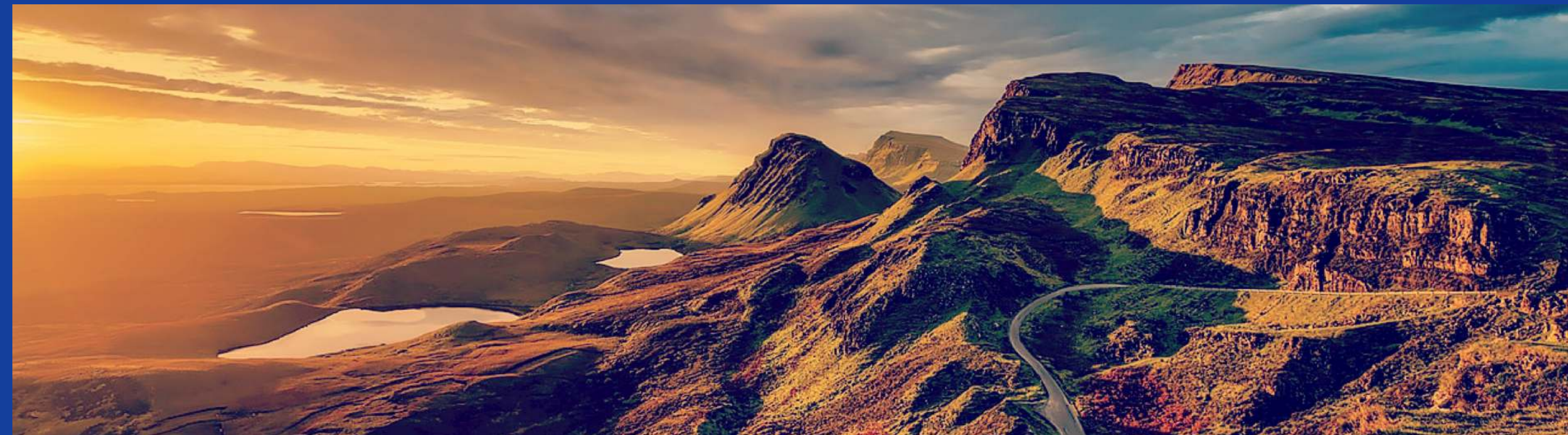
THIS IS ABOUT
**STRATEGIC RESOURCE
ALLOCATION** FOR YOUR
FUNDRAISING EFFORTS

Your time is one of the most effective
resources you have

**"THE KEY IS MAKING A FUNDRAISING
PLAN THAT MATCHES THE ACTUAL
FUNDING ENVIRONMENT."**

Section 1

MAJOR DONORS & THE FUNDING LANDSCAPE



NONPROFIT FUNDING LANDSCAPE



Individual Donors

MAJOR, annual, intermittent



Campaigns

Digital, annual, capital



Events

Galas, auctions, panels, etc



Fees for Service

Summer camps, after school programs, therapy, counseling, job training



Corporate Partnerships

Sponsorship, naming rights, volunteer, program underwriting



Corporate Philanthropy

Corporate grantmaking



Institutional Grantmakers

Private foundations, government, or public grantmakers



Contracts

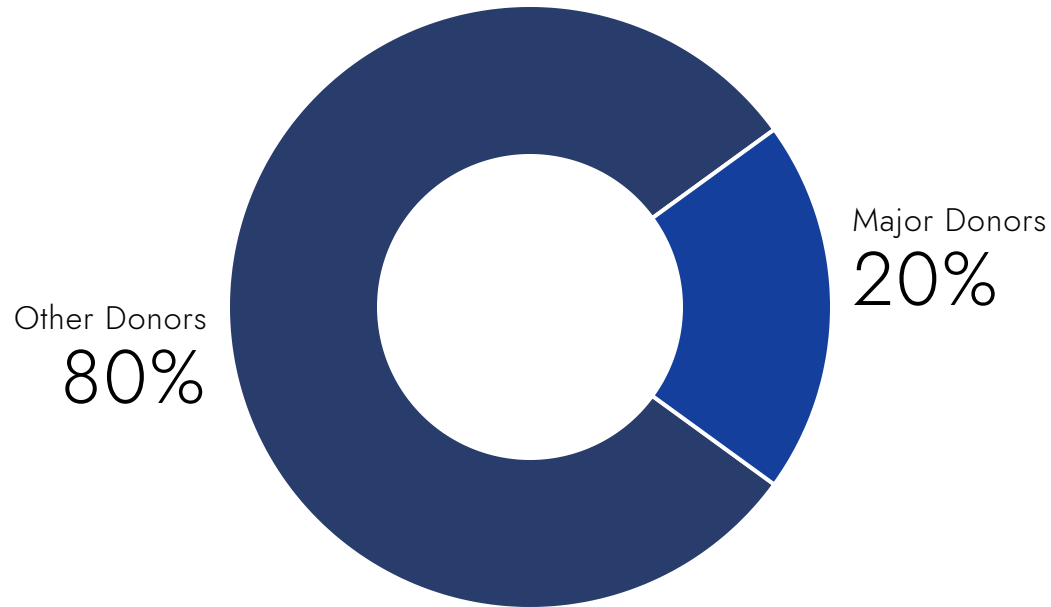
Federal, state, local

HOW DO WE DEFINE
MAJOR DONORS?

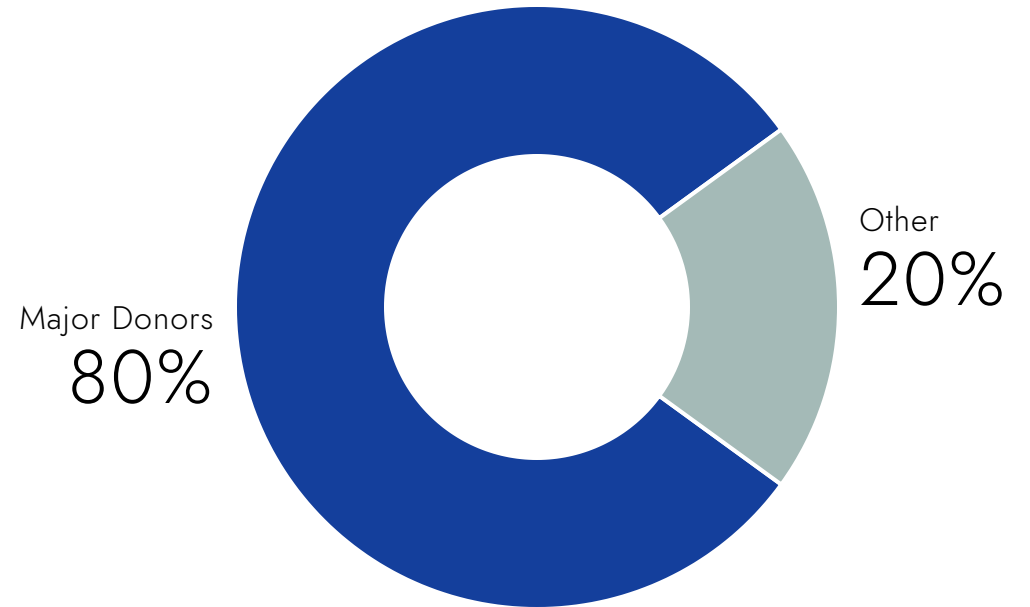
**A SIGNIFICANT PORTION OF A NONPROFIT'S
DONATIONS WILL COME FROM A SMALL GROUP OF
MAJOR DONORS.**

THE PARETO PRINCIPLE (THE 80/20 RULE)

TYPES OF DONORS

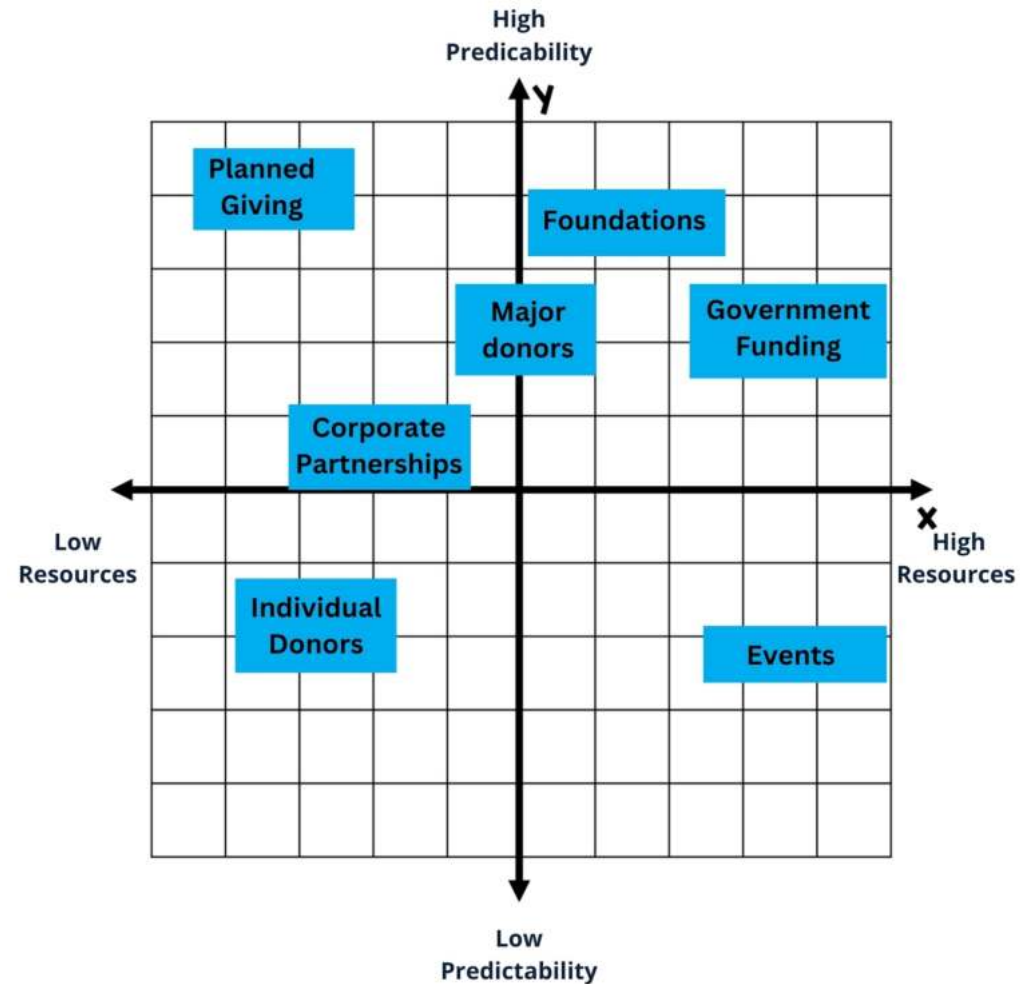


SOURCES OF FUNDING



For many nonprofits, 80% of funds come from 20% of donors. Recent giving trends and income inequality has pushed this closer to 90/10 in some sectors.

FUNDING RESOURCES AND PREDICTABILITY



A FEW REASONS TO FOCUS ON
MAJOR DONORS

- 1 Financial Impact
- 2 Stability and Predictability
- 3 Advocacy and Influence
- 4 Long-Term Commitment
- 5 Adaptability and Flexibility
- 6 **Increased Efficiency and Effectiveness**



A REMINDER ON
EFFECTIVENESS

FOCUS ON GETTING YOUR
STORY AND YOUR PITCH
AS STRONG AS POSSIBLE.

**THEN USE YOUR NETWORK
TO HELP FIGURE OUT WHO
CARES ABOUT THAT.**

THIS IS WHO YOU WANT
TO GET IN FRONT OF.

WHO ARE WE
AND
WHO FUNDS THAT?



Section 2

YOUR MESSAGE COMES FIRST

A COMPELLING MESSAGE CONNECTS
POWERFULLY WITH YOUR AUDIENCE.
IT **MOTIVATES PEOPLE TO ACTION**
BY APPEALING TO THEIR DEEPEST
NEEDS AND DESIRES.

KEY COMPONENTS OF MESSAGING

Internal
Communication

Staff
Volunteers

Stakeholder
Communication

Board of
Directors

**Major
Donors**

External Communication

Donors
Supporters
Broader Community



TAILOR YOUR MESSAGING

Crafting effective messages for fundraising requires **understanding your audience** and what motivates them to give.

Tailor your language and emotional appeals to **connect with supporters on a personal level.**

Share stories and a sense of urgency that inspires them to act.



Section 3

BUILDING DONOR RELATIONSHIPS

STRATEGY CONSIDERATIONS



**MAXIMIZING ENGAGEMENT WITH
CURRENT DONORS**



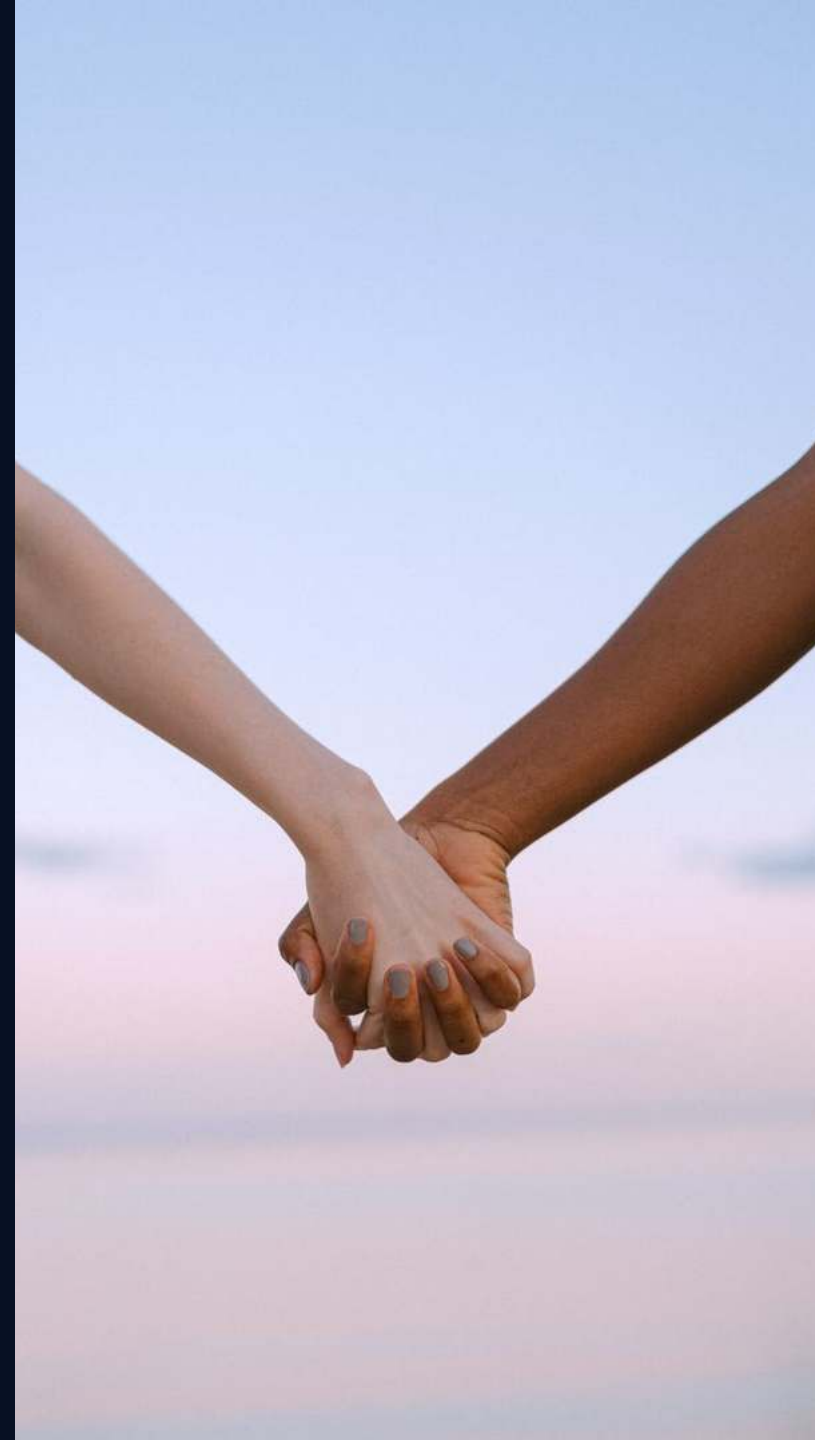
**FINDING THE LOW HANGING
FRUIT**



**BIGGER LIFTS:
DIVERSIFYING YOUR PIE**

WE HAVE TO TALK ABOUT

TRUST





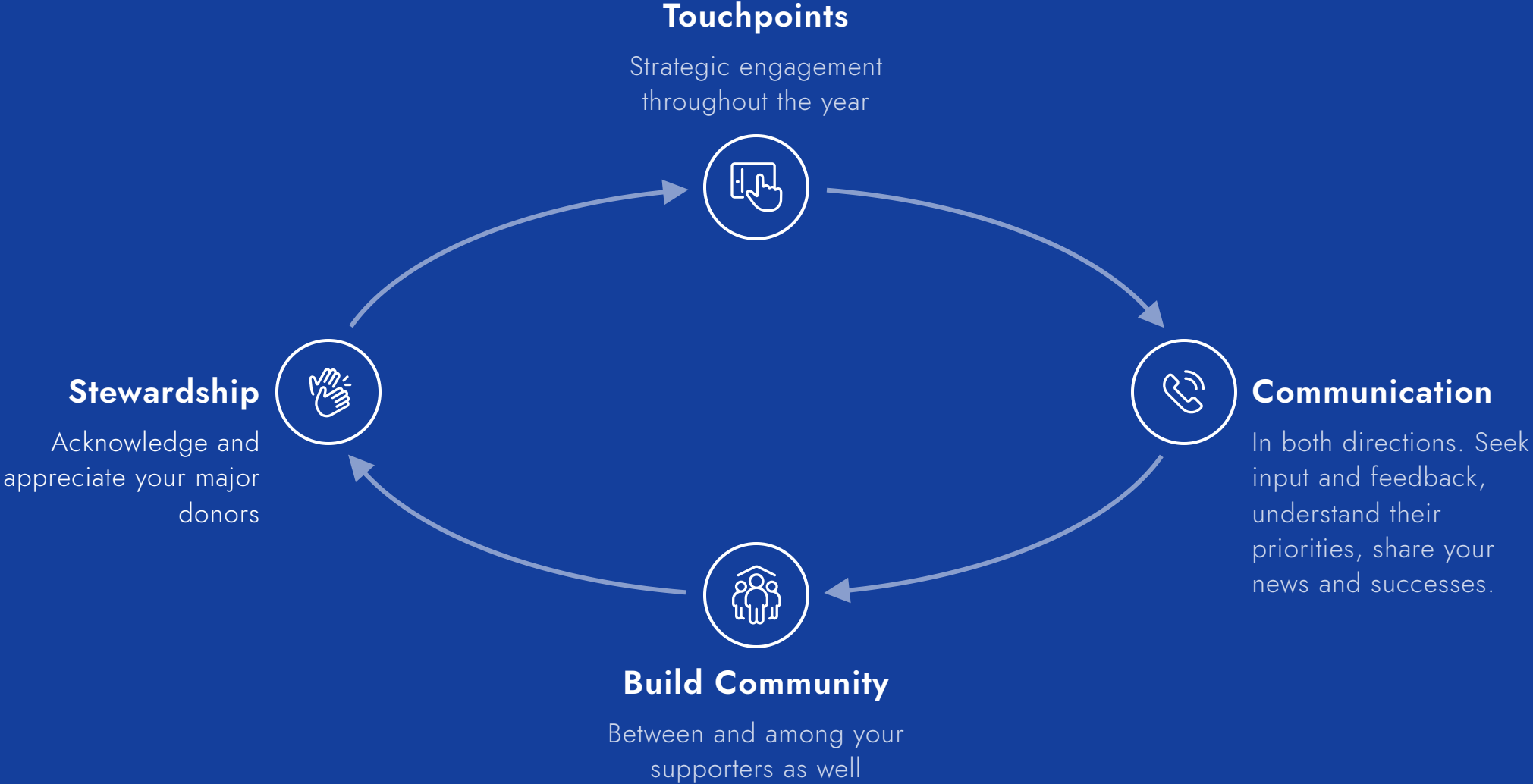
TRUST IS THE CENTER OF THE GENEROSITY MOTIVATOR ECOSYSTEM

"I TRUST THE ORGANIZATION TO DO THE RIGHT THINGS AND USE THE MONEY WISELY"



YOUR MAJOR
DONORS NEED TO
KNOW YOU TO
TRUST YOU

MAXIMIZING YOUR **CURRENT RELATIONSHIPS**





Section 4

PITCHING MAJOR DONORS

SPEND TIME CRAFTING YOUR PITCH

A concise and compelling pitch can make a persuasive case specifically for donor audiences for why your work is

impactful, urgent, and well-led.

Specific asks can be more motivating than general ones.



PITCH DOCUMENTS

A concise and effective pitch document can make a persuasive case specifically for donor audiences to support your organization.



Case for Support



Pitch Deck



2-pager

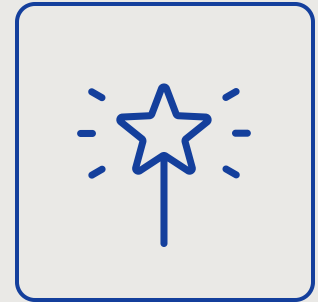
BEYOND BIG IDEAS: **HOW WILL YOU DO IT?**



Communicate
clearly



Paint a picture and
tell a story



Be compelling...
and back it up

**Big ideas can be very interesting to donors, but it can't just be an idea;
you have to back it up by demonstrating HOW you can do it.**

QUESTIONS SERIOUS DONORS WILL HAVE ABOUT YOUR WORK



Is the leadership skillful and strategic?



How much impact might a grant/donation have on issues that the donor is focused on, and is it worth paying this amount of money for that impact?



Is the organization likely to be self-aware about its own mistakes, and to learn lessons from them?



Does the leadership and staff reflect the community it's purporting to serve?



Is it something exciting to focus on right now?



Do the values and approaches of the organization fit the values of the donor?



Does the organization have the capacity to execute on this plan?



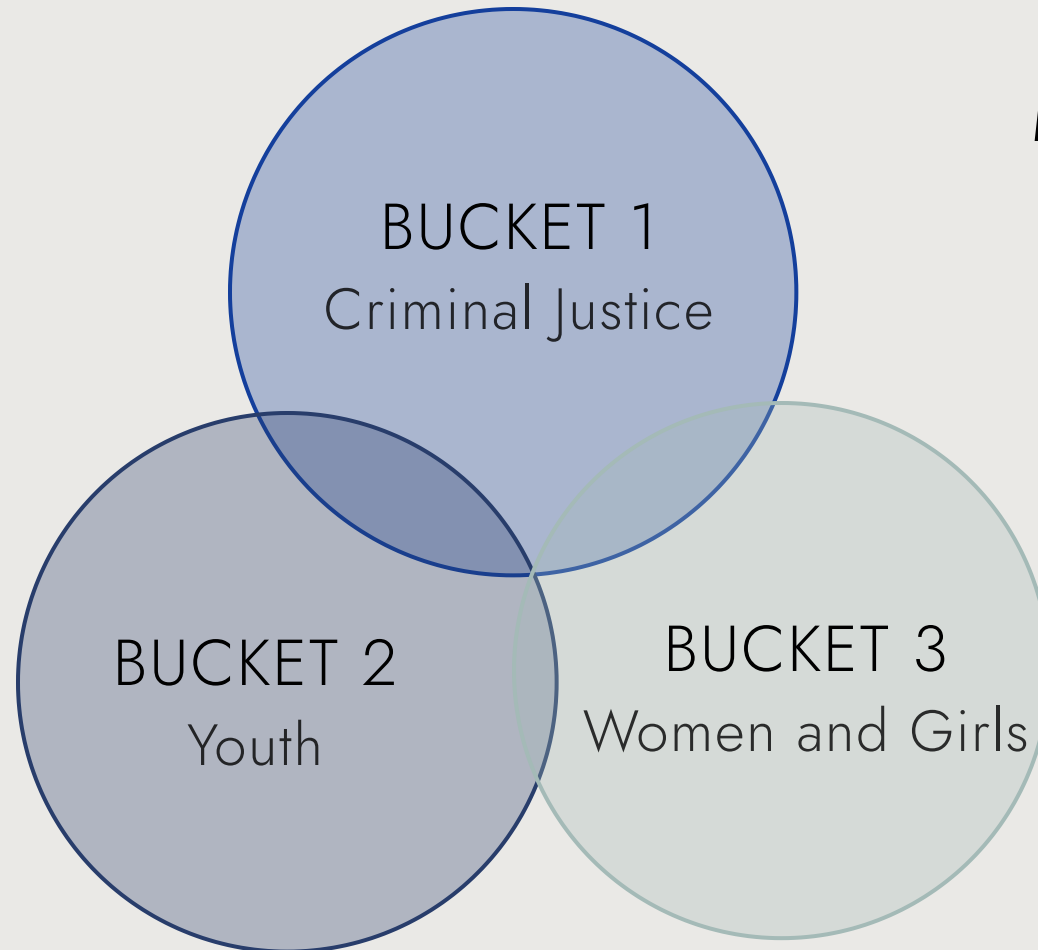
What is the organization's track record for doing the type of work proposed?



Does the organization focus on impact, not just activities?

REMEMBER: DONORS OFTEN THINK IN "BUCKETS"

Think about what category buckets your organization's work might fit into



Make them obvious in your pitch documents



WHO SHOULD DO THE PITCHING?

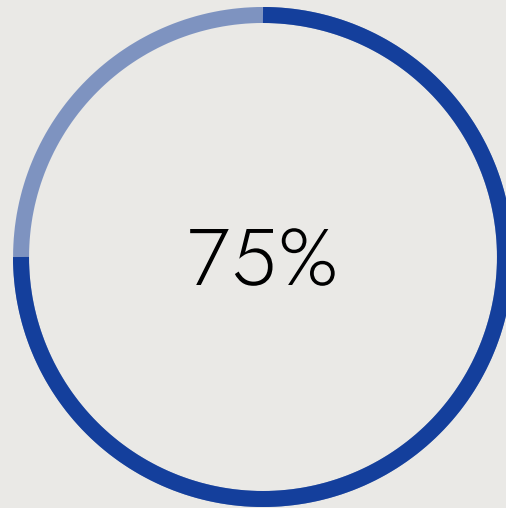
Ask yourself, **who needs to spend time focused on relationship cultivation, fundraising, and pitching?**

Can some of the work be **broken up or delegated?**

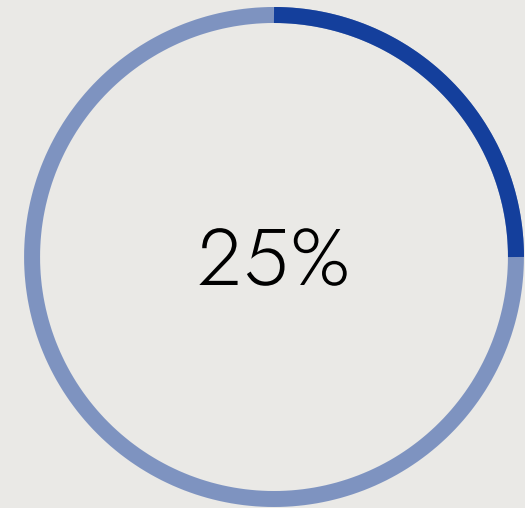
Who has the skills to build trust?

ROLES AND RESPONSIBILITIES

There is no perfect allocation!



Executive Director



Development Director

SECTION 5:

WORK SMART:
PROJECT MANAGE
YOUR APPROACH



BE **RUTHLESS** WITH YOUR TIME.
IT'S YOUR NUMBER ONE
STRATEGIC ASSET.

PUT STRATEGY FIRST

Adopt a Project Management Approach





A PROJECT MANAGEMENT APPROACH TO YOUR CURRENT DONORS

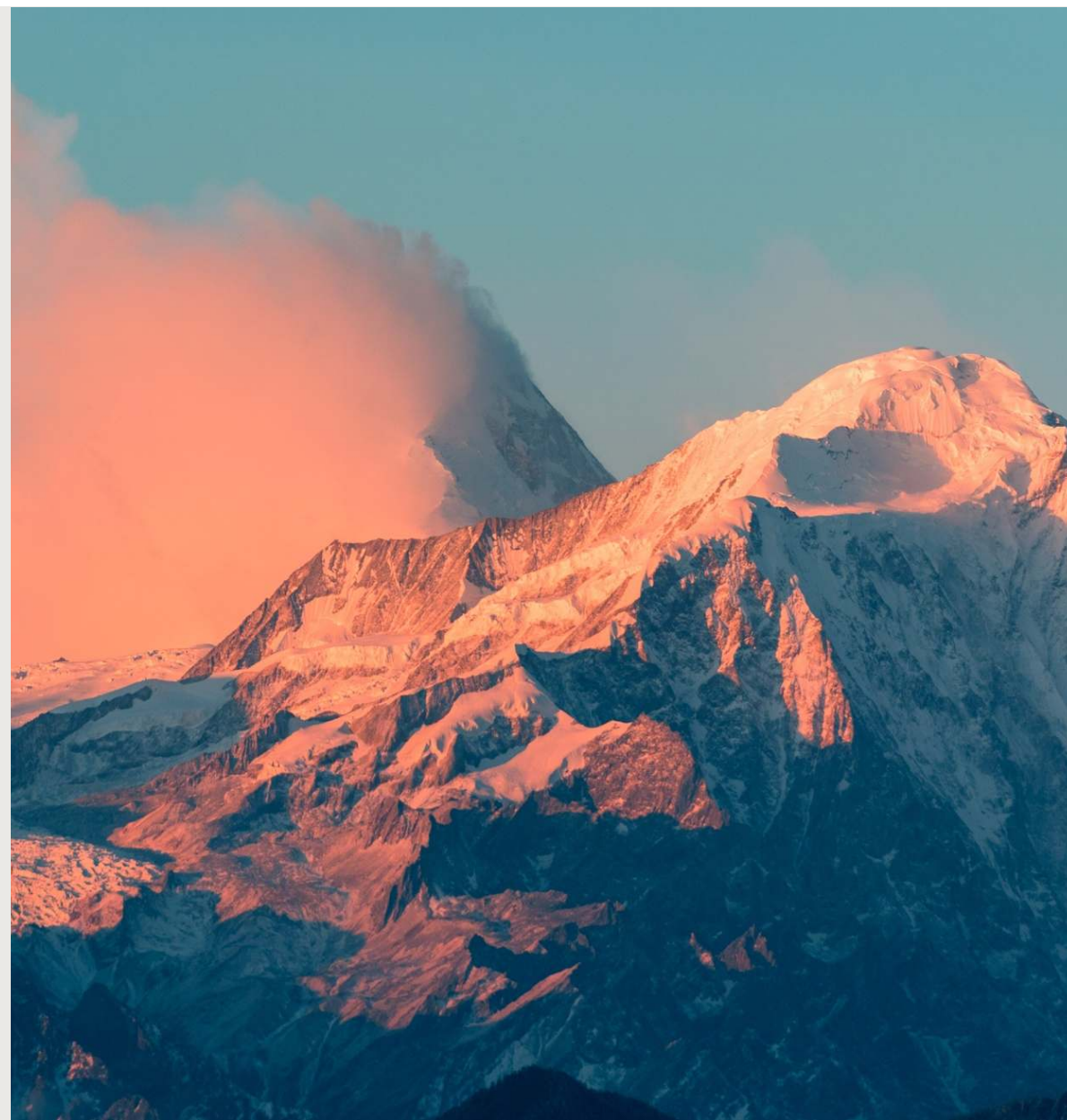
STEP ONE: MAXIMIZING ENGAGEMENT WITH CURRENT DONORS

Start with mapping out
your **current donors**

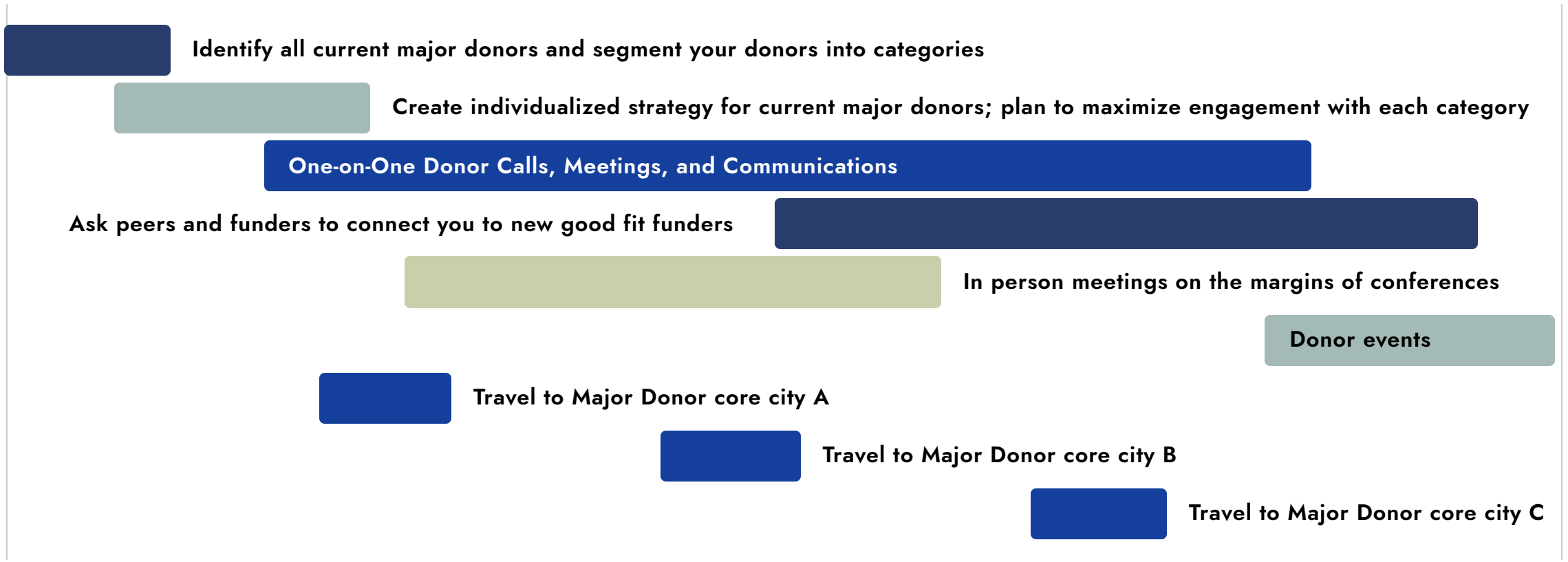
Take the top 20%
and treat them as
major donors

Each one gets **their
own engagement
strategy**

LEVELING UP



PROJECT MANAGE YOUR MAJOR DONOR STRATEGY: YOUR CALENDAR IS A TOOL



MAPPING OUT
THE **LONG**
GAME



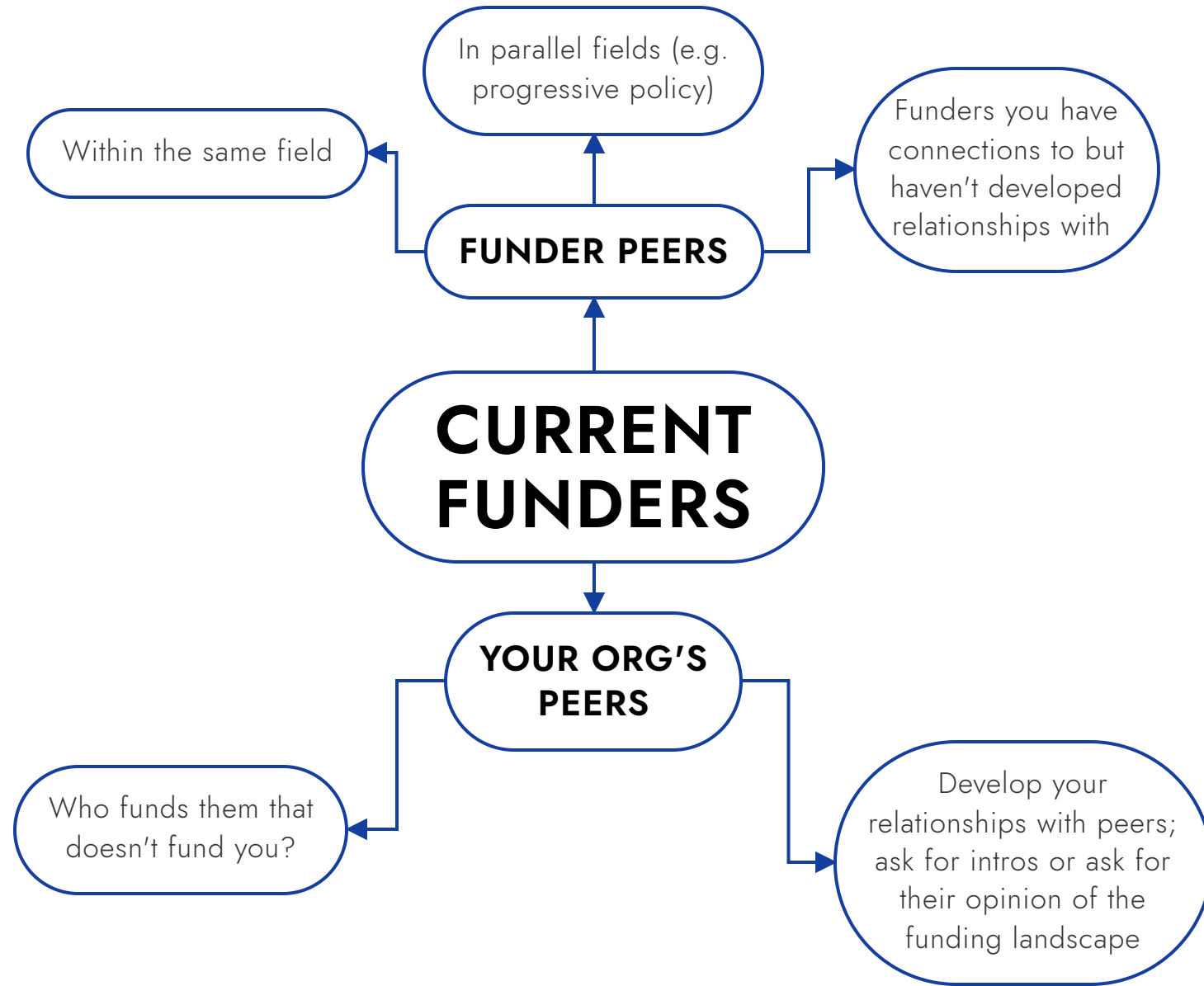
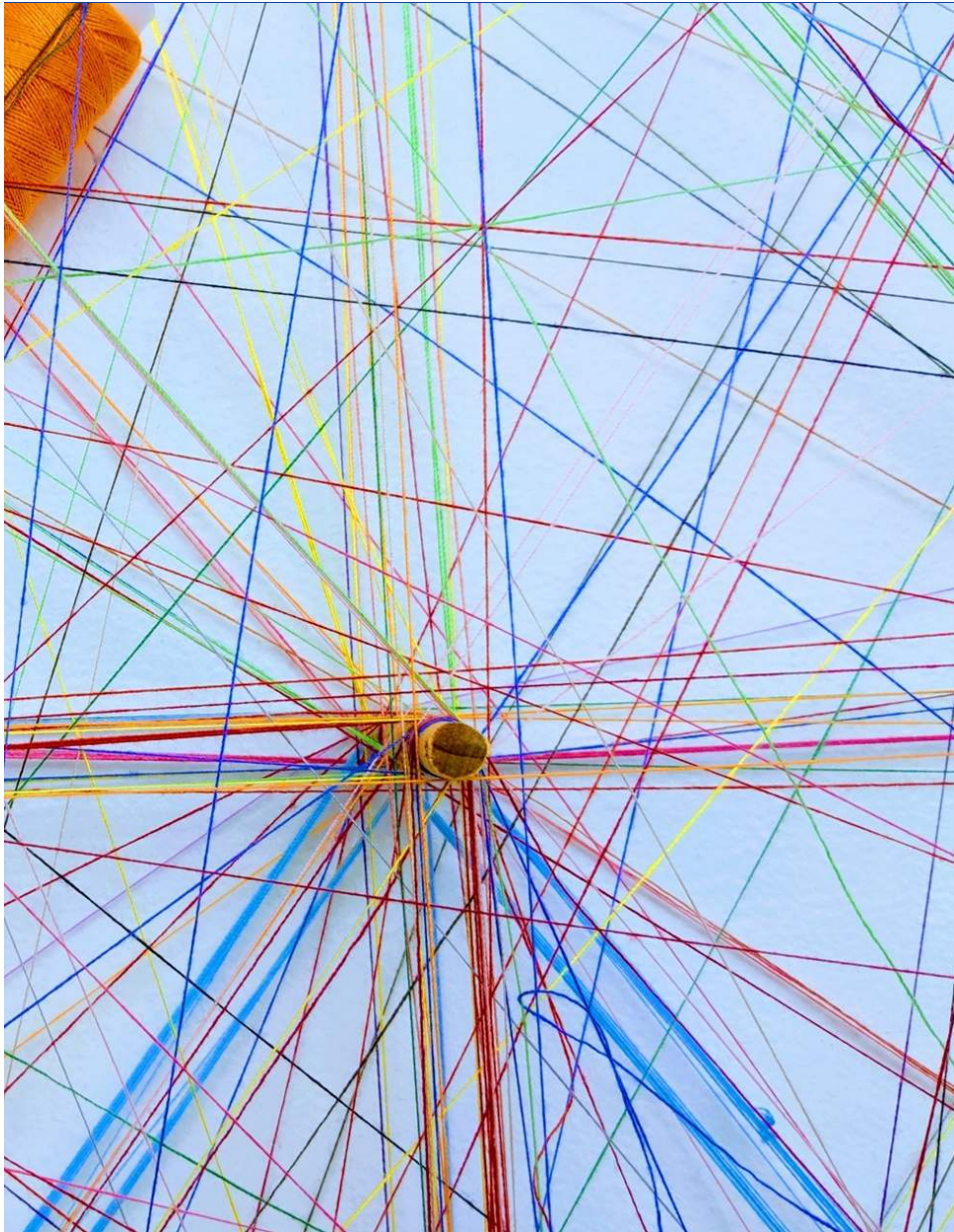
CULTIVATING NEW MAJOR DONORS OVER TIME

You've figured out how to describe who you are and what you're trying to achieve. You've also maximized engagement with current donors. **Now you need to focus getting in front of new donors that want to fund your work.**



THE IMPORTANCE
OF **WARM**
CONNECTIONS





HOW TO **MAKE THE MOST OF YOUR TIME** WITH POTENTIAL DONORS



- 1 Focus on what you're asking for:
What do you want to happen as a result of this meeting?
- 2 Craft your message accordingly
- 3 Practice and seek feedback
- 4 Be prepared, professional, and kind
- 5 Follow up!

PERSISTENCE AND PERSPECTIVE IN OUTREACH





- Donors know you're going to ask! It's ok, it's your job as a leader to resource your organization.
- Seeking alignment with their priorities is key
- Persistence and overcoming rejection: don't take it personally & just keep going
- You're planting seeds
- It's a long game! Pace yourself and plan

YOUR STRATEGIC PATH



**PROJECT MANAGE YOUR
MAJOR DONOR
STRATEGY**



**MAXIMIZE ENGAGEMENT
WITH CURRENT MAJOR
DONORS**



**FIND THE LOW
HANGING FRUIT:
EXPLORE THE NEXT LAYER
OF CONNECTIONS**



**BIGGER LIFTS:
DIVERSIFYING YOUR MAJOR
DONOR PORTFOLIO
THROUGH LUKEWARM OR
COLD OUTREACH**

THANK YOU



WE ARE HERE TO SUPPORT
YOUR STRATEGIC JOURNEY.



CAPACITA
CONSULTING

Adriana@CapacitaConsulting.com

www.capacitaconsulting.com