
Professional Certificate in Resource Mobilization

Fundraising Strategies and Techniques

Fundraising Strategies and Techniques Glossary

1. Annual Fund:

The annual fund is a fundraising strategy that focuses on soliciting donations on a yearly basis. This strategy involves reaching out to donors regularly to secure financial support for ongoing programs and operations. Annual funds are essential for sustaining an organization's day-to-day activities.

2. Ask Amount:

The ask amount refers to the specific dollar amount requested from a donor during a fundraising solicitation. It is crucial to determine the appropriate ask amount based on the donor's capacity and relationship with the organization to maximize fundraising success.

3. Capital Campaign:

A capital campaign is a fundraising initiative that aims to raise a large sum of money for a specific project or capital improvement, such as constructing a new building, renovating facilities, or acquiring major equipment. Capital campaigns typically have defined goals and timelines.

4. Crowdfunding:

Crowdfunding is a fundraising technique that involves raising small amounts of money from a large number of people, typically through online platforms. This approach leverages social networks and digital channels to reach a broad audience and generate support for a cause or project.

5. Donor Stewardship:

Donor stewardship refers to the process of building and maintaining relationships with donors to ensure their continued engagement and support. It involves expressing gratitude, providing updates on the impact of donations, and recognizing donors for their contributions.

6. Event Fundraising:

Event fundraising involves organizing special events, such as galas, auctions, marathons, or concerts, to raise funds for a cause or organization. These events offer opportunities to engage donors, raise awareness, and solicit donations in a social setting.

7. Major Gifts:

Major gifts are significant donations made by individuals, corporations, or foundations to support a nonprofit organization's mission or projects. Major gift fundraising focuses on cultivating relationships with high-net-worth donors to secure substantial contributions.

8. Online Giving:

Online giving refers to the process of accepting donations through digital platforms, websites, and mobile apps. This fundraising technique enables organizations to reach a wider audience, simplify the donation process, and track donor interactions more effectively.

9. Peer-to-Peer Fundraising:

Peer-to-peer fundraising involves empowering supporters to raise funds on behalf of an organization by soliciting donations from their network of friends, family, and colleagues. This strategy leverages personal connections to expand fundraising reach and engage new donors.

10. Planned Giving:

Planned giving, also known as legacy giving, involves donors making charitable contributions through their estate plans, wills, trusts, or other financial instruments. This long-term fundraising strategy allows donors to leave a lasting impact on an organization's mission.

11. Prospect Research:

Prospect research is the process of identifying and evaluating potential donors based on their capacity and inclination to give. This strategic approach helps organizations prioritize fundraising efforts, tailor solicitations, and build relationships with high-potential donors.

12. Recurring Giving:

Recurring giving, also known as monthly giving, involves donors setting up automatic, regular donations to support an organization on an ongoing basis. This fundraising technique provides a predictable source of revenue and fosters donor loyalty over time.

13. Sponsorship:

Sponsorship involves businesses, corporations, or individuals providing financial support to an organization, event, or program in exchange for promotional benefits or visibility. Sponsorship agreements are mutually beneficial partnerships that help raise funds and enhance brand recognition.

14. Stewardship Plan:

A stewardship plan outlines the strategies and activities for engaging, recognizing, and retaining donors to ensure a positive donor experience. This plan includes personalized communication, impact reports, and opportunities for donor involvement in the organization.

15. Telemarketing:

Telemarketing is a fundraising technique that involves soliciting donations or selling products or services over the phone. While telemarketing can be an effective way to reach donors directly, it is essential to comply with regulations and maintain ethical fundraising practices.

16. Thank You Letter:

A thank you letter is a formal expression of gratitude sent to donors to acknowledge their contributions and

support. Thank you letters should be personalized, timely, and heartfelt to show appreciation and strengthen donor relationships.

17. Volunteer Fundraising:

Volunteer fundraising involves engaging volunteers to help raise funds for an organization through peer-to-peer outreach, events, or campaigns. Volunteers play a vital role in expanding fundraising reach, building community support, and amplifying the organization's impact.

18. Matching Gifts:

Matching gifts programs are initiatives offered by employers to match their employees' charitable contributions to eligible nonprofits. This fundraising technique encourages donors to maximize their impact by doubling or even tripling their donations through corporate matching.

19. Donor Acquisition:

Donor acquisition refers to the process of attracting new donors to an organization through various marketing, outreach, and fundraising strategies. Acquiring new donors is essential for expanding the donor base, increasing revenue, and diversifying funding sources.

20. Donor Retention:

Donor retention focuses on maintaining relationships with existing donors to encourage repeat donations and long-term engagement. Retaining donors requires effective communication, personalized stewardship, and demonstrating the impact of their contributions.

21. Donor Segmentation:

Donor segmentation involves categorizing donors based on common characteristics, such as giving history, interests, or demographics, to tailor fundraising appeals and communications. Segmenting donors allows organizations to personalize interactions and maximize fundraising effectiveness.

22. Donor Lifecycle:

The donor lifecycle refers to the stages of a donor's relationship with an organization, from initial awareness and acquisition to ongoing engagement, retention, and potentially legacy giving. Understanding the donor lifecycle helps organizations optimize fundraising strategies and maximize donor impact.

23. Donor Cultivation:

Donor cultivation is the process of building relationships with donors through personalized communication, engagement opportunities, and stewardship activities. Cultivating donors involves understanding their motivations, interests, and preferences to deepen their connection with the organization.

24. Donor Acknowledgment:

Donor acknowledgment is the act of recognizing and thanking donors for their contributions to an organization. Acknowledgment can take various forms, such as thank you letters, phone calls, emails, or personalized notes, to express gratitude and reinforce donor support.

25. Fundraising Plan:

A fundraising plan is a strategic document that outlines an organization's fundraising goals, objectives, strategies, and tactics to achieve financial targets. A well-developed fundraising plan guides resource mobilization efforts, monitors progress, and adapts to changing circumstances.

26. Fundraising Calendar:

A fundraising calendar is a schedule that outlines key fundraising activities, events, campaigns, and appeals throughout the year. The calendar helps organizations plan and coordinate fundraising efforts, allocate resources effectively, and engage donors strategically.

27. Fundraising Metrics:

Fundraising metrics are quantitative measurements used to evaluate the effectiveness of fundraising activities, track performance, and assess outcomes. Common fundraising metrics include donor retention rates, gift size, return on investment, and fundraising costs.

28. Fundraising Software:

Fundraising software, also known as donor management software, is a technology solution that helps organizations streamline fundraising processes, manage donor relationships, track donations, and generate reports. Fundraising software enhances efficiency, data accuracy, and donor communication.

29. Fundraising Campaign:

A fundraising campaign is a coordinated effort to raise funds for a specific cause, project, or initiative within a defined timeframe. Campaigns may include multiple strategies, channels, and tactics to engage donors, generate support, and meet fundraising goals.

30. Fundraising Event:

A fundraising event is a special gathering or activity organized to raise funds for a nonprofit organization or cause. Fundraising events can range from small gatherings, such as house parties or bake sales, to large-scale galas, auctions, concerts, or marathons.

31. Fundraising Strategy:

A fundraising strategy is a comprehensive plan that outlines an organization's approach to raising funds, achieving financial sustainability, and advancing its mission. A well-defined fundraising strategy aligns with organizational goals, donor preferences, and market trends to maximize impact.

32. Fundraising Tactics:

Fundraising tactics are specific actions, methods, or techniques used to implement fundraising strategies and achieve fundraising goals. Tactics may include direct mail, email appeals, social media campaigns, telemarketing, major gift solicitations, events, or online giving platforms.

33. Fundraising Challenges:

Fundraising challenges are obstacles, barriers, or complexities that organizations encounter in mobilizing

resources, engaging donors, and achieving fundraising success. Common challenges include donor fatigue, economic downturns, competition for funding, and changing donor preferences.

34. Fundraising Trends:

Fundraising trends are emerging practices, innovations, or shifts in the fundraising landscape that impact donor behavior, fundraising strategies, and nonprofit sustainability. Staying informed about fundraising trends helps organizations adapt, innovate, and stay competitive in the fundraising sector.

35. Fundraising Ethics:

Fundraising ethics are principles, standards, and guidelines that govern ethical conduct, transparency, and integrity in fundraising practices. Ethical fundraising ensures respect for donors, accountability for funds, and compliance with legal and ethical standards to maintain public trust.

36. Fundraising Budget:

A fundraising budget is a financial plan that outlines the anticipated revenue, expenses, and resources needed to execute fundraising activities and programs. Budgeting helps organizations allocate funds strategically, monitor financial performance, and ensure fiscal responsibility in fundraising.

37. Fundraising Impact:

Fundraising impact refers to the tangible outcomes, results, or benefits generated by fundraising efforts on an organization's mission, programs, or beneficiaries. Measuring fundraising impact helps organizations assess effectiveness, demonstrate value to donors, and drive positive change.

38. Fundraising Communication:

Fundraising communication involves crafting compelling messages, stories, and appeals to engage donors, inspire giving, and convey the impact of donations. Effective fundraising communication uses various channels, such as websites, social media, emails, and direct mail, to reach and motivate donors.

39. Fundraising Innovation:

Fundraising innovation involves exploring new ideas, technologies, or approaches to enhance fundraising effectiveness, engage donors, and generate revenue. Innovations in fundraising may include crowdfunding, peer-to-peer campaigns, mobile giving, or virtual events to adapt to changing donor preferences.

40. Fundraising Strategy Evaluation:

Fundraising strategy evaluation is the process of assessing the performance, outcomes, and impact of fundraising strategies to determine effectiveness, identify strengths and weaknesses, and inform future planning. Evaluation helps organizations optimize resources, learn from experiences, and improve fundraising results.

41. Fundraising Portfolio:

A fundraising portfolio is a collection of fundraising prospects, donors, or opportunities managed by a fundraising professional or development team. The portfolio includes donor profiles, cultivation strategies,

solicitation plans, and stewardship activities to maximize fundraising success.

42. Fundraising Pipeline:

A fundraising pipeline is a systematic approach to managing fundraising prospects, donors, and opportunities through various stages of engagement, cultivation, solicitation, and stewardship. The pipeline helps organizations track donor relationships, prioritize efforts, and secure gifts effectively.

43. Fundraising Research:

Fundraising research involves gathering data, insights, and information about donors, philanthropic trends, and fundraising strategies to inform decision-making, planning, and resource mobilization. Research helps organizations identify opportunities, assess risks, and tailor fundraising approaches to donor preferences.

44. Fundraising Impact Assessment:

Fundraising impact assessment is the process of measuring, analyzing, and reporting the outcomes, results, and effectiveness of fundraising efforts on organizational goals, programs, and beneficiaries. Impact assessment helps organizations demonstrate accountability, transparency, and value to donors and stakeholders.

45. Fundraising Training:

Fundraising training provides education, skills development, and best practices to fundraising professionals, staff, volunteers, and board members to enhance their fundraising knowledge, capabilities, and effectiveness. Training programs cover various aspects of fundraising, donor relations, and ethical practices.

46. Fundraising Data Management:

Fundraising data management involves collecting, storing, organizing, and analyzing donor information, gift transactions, and fundraising activities to support strategic decision-making, donor stewardship, and performance tracking. Data management systems help organizations maintain accurate records, track donor interactions, and segment audiences effectively.

47. Fundraising Compliance:

Fundraising compliance refers to adhering to legal requirements, regulations, and ethical standards governing fundraising practices, donor solicitation, and financial transparency. Compliance ensures that organizations operate ethically, protect donor privacy, and maintain public trust in fundraising activities.

48. Fundraising Impact Reporting:

Fundraising impact reporting involves communicating the outcomes, achievements, and impact of fundraising efforts to donors, stakeholders, and the public. Impact reports highlight the value of donor contributions, demonstrate program effectiveness, and build trust in the organization's mission and impact.

49. Fundraising Sustainability:

Fundraising sustainability refers to an organization's ability to generate consistent revenue, diversify funding sources, and adapt to changing economic conditions to support its mission and programs in the long term.

Sustainable fundraising practices ensure financial stability, growth, and impact for the organization.

50. Fundraising Partnership:

A fundraising partnership is a collaborative relationship between organizations, businesses, or individuals to support mutual fundraising goals, share resources, and leverage networks for greater impact. Partnerships can involve joint campaigns, events, sponsorships, or cause-related marketing initiatives to expand fundraising reach and effectiveness.

51. Fundraising Volunteer Management:

Fundraising volunteer management involves recruiting, training, coordinating, and recognizing volunteers who support fundraising activities, events, and campaigns. Volunteer management ensures that volunteers are engaged effectively, motivated to contribute, and aligned with the organization's fundraising objectives.

52. Fundraising Donor Engagement:

Fundraising donor engagement focuses on building relationships, fostering connections, and involving donors in the organization's mission, programs, and impact. Donor engagement strategies include personalized communication, exclusive opportunities, and meaningful interactions to deepen donor commitment and loyalty.

53. Fundraising Donor Acquisition Cost:

Fundraising donor acquisition cost is the amount of money spent to acquire a new donor through marketing, outreach, and fundraising efforts. Calculating donor acquisition cost helps organizations evaluate the efficiency of their fundraising strategies, measure return on investment, and optimize resource allocation.

54. Fundraising Donor Retention Rate:

Fundraising donor retention rate is the percentage of donors who continue to support an organization over time by making repeat donations. Monitoring donor retention rate helps organizations assess donor loyalty, identify retention strategies, and prioritize efforts to build long-term donor relationships.

55. Fundraising Donor Lifetime Value:

Fundraising donor lifetime value is the total amount of revenue expected from a donor's contributions over their lifetime of supporting an organization. Calculating donor lifetime value helps organizations understand the impact of donor relationships, prioritize donor segments, and maximize fundraising revenue.

56. Fundraising Donor Segmentation Strategy:

Fundraising donor segmentation strategy involves dividing donors into distinct groups based on common characteristics, behaviors, or preferences to tailor fundraising appeals, communications, and engagement strategies. Segmentation helps organizations personalize interactions, target donors effectively, and optimize fundraising outcomes.

57. Fundraising Donor Recognition Program:

Fundraising donor recognition program is the systematic and meaningful acknowledgment of donors' contributions, support, and impact on an organization's mission, programs, and beneficiaries. Recognition programs include naming opportunities, donor walls, events, and exclusive benefits to express gratitude and foster donor relationships.

58. Fundraising Donor Feedback Mechanism:

Fundraising donor feedback mechanism is a system that enables donors to provide input, suggestions, and feedback on their giving experience, preferences, and interactions with the organization. Feedback mechanisms help organizations listen to donors, improve communication, and enhance donor satisfaction and engagement.

59. Fundraising Donor Engagement Platform:

Fundraising donor engagement platform is a technology solution that facilitates donor interactions, communications, and engagement with an organization through digital channels, such as websites, social media, emails, and mobile apps. Engagement platforms help organizations connect with donors, cultivate relationships, and drive fundraising results.

60. Fundraising Donor Retention Strategy:

Fundraising donor retention strategy involves developing and implementing initiatives, activities, and communications to keep donors engaged, connected, and supportive of an organization over time. Retention strategies focus on building relationships, demonstrating impact, and providing personalized stewardship to retain donors and maximize their lifetime value.

61. Fundraising Donor Acquisition Strategy:

Fundraising donor acquisition strategy is a systematic plan that outlines how an organization attracts, engages, and converts new donors to support its mission, programs, and initiatives. Acquisition strategies include outreach campaigns, events, partnerships, and targeted communications to attract and onboard new donors effectively.

62. Fundraising Donor Thank You Campaign:

Fundraising donor thank you campaign is a targeted and personalized initiative to express gratitude, appreciation, and recognition to donors for their contributions, support, and impact on the organization. Thank you campaigns include thank you letters, calls, emails, and special acknowledgments to strengthen donor relationships and foster loyalty.

63. Fundraising Donor Engagement Journey:

Fundraising donor engagement journey is the process of guiding donors through a series of interactions, touchpoints, and experiences that deepen their connection, involvement, and commitment to an organization's mission, programs, and impact. Engagement journeys focus on building relationships, creating value, and inspiring ongoing support from donors.

64. Fundraising Donor Retention Program:

Fundraising donor retention program is a structured and ongoing initiative to engage, retain, and steward donors to ensure their continued support, loyalty, and involvement with an organization. Retention programs include personalized communications, donor recognition, impact updates, and exclusive benefits to enhance donor satisfaction and long-term commitment.

65. Fundraising Donor Acquisition Campaign:

Fundraising donor acquisition campaign is a targeted and coordinated effort to attract, engage, and convert new donors to support an organization's mission, programs, and initiatives. Acquisition campaigns use various channels, messages, and appeals to reach potential donors, inspire giving, and onboard new supporters effectively.

66. Fundraising Donor Segmentation Model:

Fundraising donor segmentation model is a framework that categorizes donors into distinct groups based on specific criteria, such as giving history, preferences, interests, or demographics. Segmentation models help organizations customize fundraising strategies, communications, and engagement tactics to target donors effectively and maximize fundraising results.

67. Fundraising Donor Stewardship Plan:

Fundraising donor stewardship plan is a strategic roadmap that outlines how an organization engages, recognizes, and retains donors to build long-term relationships, trust, and loyalty. Stewardship plans include personalized touchpoints, impact reports, exclusive opportunities, and ongoing communications to demonstrate appreciation and cultivate donor commitment.

68. Fundraising Donor Cultivation Strategy:

Fundraising donor cultivation strategy involves nurturing relationships, building trust, and deepening connections with donors through personalized interactions, engagement opportunities,