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Advanced Skill Certificate in Donor Relations and Fundraising

## Building a Fundraising Strategy

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### Annual Giving

Related terms: donor retention, recurring gift

Explanation: A fundraising approach that encourages donors to give a set amount each year, typically through a subscription-style model. It builds predictable revenue streams and deepens donor relationships over time. Example: A museum launches a "Friends Circle" program where members pledge \$100 annually, receiving exclusive previews and newsletters. Practical application: Set up automated payment processing, segment donors by giving frequency, and communicate the cumulative impact of yearly contributions.

Challenges: Maintaining engagement between annual cycles, preventing donor fatigue, and ensuring the administrative system can handle recurring transactions efficiently.

### Appreciative Inquiry

Related terms: donor cultivation, relationship building

Explanation: A strengths-based dialogue method that focuses on what works well in donor relationships, rather than fixing problems. It involves asking positive, future-oriented questions to uncover motivations and aspirations. Example: During a donor interview, a fundraiser asks, "What inspired you to support our education program, and how would you like to see it evolve?"

Practical application: Use this technique in donor interviews and stewardship meetings to co-create vision statements and tailor engagement plans. Challenges: Requires skilled interviewers, may uncover expectations that exceed organizational capacity, and can be time-intensive to implement across large donor bases.

### Bylaws

Related terms: governance, fiduciary responsibility

Explanation: The formal, written rules that govern an organization's structure, decision-making processes, and member responsibilities. They provide legal protection and clarify authority for fundraising activities. Example: A nonprofit's bylaws specify that any fundraising campaign exceeding \$50,000 must be approved by the board's finance committee. Practical application: Review bylaws before launching major campaigns to ensure compliance, and update them periodically to reflect new fundraising strategies. Challenges: Keeping bylaws current with evolving regulations, balancing flexibility with necessary controls, and communicating changes to staff and volunteers.

### Case for Support

Related terms: case statement, impact narrative

Explanation: A concise, compelling document that articulates an organization's mission, vision, and the specific problem it addresses, linking donor investment to measurable outcomes. It serves as the foundation

for all fundraising communications. Example: A health charity's case for support outlines the prevalence of a disease, the gap in services, and how a \$5 million fund will expand treatment centers, saving 10,000 lives annually. Practical application: Use the case for support to craft grant proposals, donor letters, and website copy, ensuring consistency across all channels. Challenges: Maintaining relevance as programs evolve, avoiding jargon, and translating complex data into an emotionally resonant story.

### Donor Acquisition

Related terms: prospect research, lead generation

Explanation: The process of identifying, attracting, and converting new individuals or entities into donors. It involves market segmentation, targeted outreach, and initial engagement tactics. Example: A university conducts a digital campaign using LinkedIn ads to attract alumni who have not yet given, offering a personalized "welcome" webinar. Practical application: Develop acquisition funnels with clear entry points, track conversion metrics, and allocate resources to high-potential channels. Challenges: High cost per acquisition, low conversion rates, and ensuring new donors align with long-term stewardship goals.

### Donor Cultivation

Related terms: relationship management, engagement strategy

Explanation: The ongoing process of building rapport, trust, and commitment with potential donors through tailored communications, events, and personalized interactions. Example: A wildlife organization hosts intimate field trips for prospective donors, allowing them to observe conservation work firsthand. Practical application: Create a cultivation calendar that schedules touchpoints such as thank-you calls, impact updates, and invitation-only events. Challenges: Managing diverse donor preferences, avoiding overly aggressive solicitation, and measuring the effectiveness of cultivation activities.

### Donor Lifecycle

Related terms: donor journey, retention strategy

Explanation: A model that maps a donor's progression from awareness to advocacy, highlighting key stages such as prospecting, first gift, repeat giving, and major giving. Example: A nonprofit tracks donors through phases: Awareness → First Gift → Annual Giving → Major Gift → Ambassador. Practical application: Align communication tactics and resource allocation with each lifecycle stage to maximize conversion and loyalty. Challenges: Accurately segmenting donors, avoiding one-size-fits-all messaging, and integrating data across multiple platforms.

### Donor Retention

Related terms: stewardship, loyalty metrics

Explanation: The ability of an organization to keep existing donors engaged and giving over time, measured by retention rates and average gift growth. Example: After implementing a quarterly impact report, a charity raises its three-year donor retention from 58% to 72%. Practical application: Conduct regular satisfaction surveys, personalize thank-you communications, and recognize donors publicly. Challenges: Competing charitable causes, donor fatigue, and insufficient data to predict attrition risk.

### Donor Retention Rate

Related terms: renewal ratio, loyalty index

Explanation: The percentage of donors who give again in a subsequent period, typically calculated annually. It reflects the effectiveness of stewardship and engagement efforts. Example: An arts organization calculates a 2025 retention rate of 81% by dividing the number of donors who gave in 2024 and again in 2025 by the total donors in 2024. Practical application: Benchmark against sector averages, set incremental improvement targets, and identify at-risk donors for focused outreach. Challenges: Inconsistent data capture, varying definition of "renewal" across campaigns, and external factors influencing donor behavior.

### Donor Journey

Related terms: experience map, touchpoint analysis

Explanation: The series of interactions a donor experiences with an organization, from first awareness through ongoing engagement and advocacy. Mapping this journey helps optimize each touchpoint for impact. Example: A health nonprofit charts a donor's path: Social media ad → Website sign-up → Welcome email → First donation → Quarterly newsletter → Volunteer invitation. Practical application: Use journey mapping tools to identify gaps, personalize content, and streamline the conversion process. Challenges: Capturing data across offline and online channels, ensuring a seamless experience, and adapting the map as donor expectations evolve.

### Earned Income

Related terms: social enterprise, revenue diversification

Explanation: Revenue generated from selling goods or services, rather than from donations or grants. It can supplement fundraising and increase financial resilience. Example: A museum operates a gift shop and charges admission fees, contributing 15% of its annual budget. Practical application: Develop a business plan for merchandise, assess market demand, and align products with the mission to reinforce brand identity. Challenges: Balancing commercial activities with nonprofit status, managing tax implications, and avoiding mission drift.

### Fiduciary Responsibility

Related terms: board oversight, financial stewardship

Explanation: The legal and ethical duty of an organization's leadership to manage assets prudently, ensuring transparency, accountability, and alignment with donor intent. Example: A charity's board approves an annual audit and establishes a policy that all restricted gifts must be used solely for designated programs. Practical application: Implement robust financial controls, conduct regular audits, and communicate financial health to donors. Challenges: Navigating complex regulations, maintaining donor trust during financial setbacks, and integrating fiduciary duties into fundraising decisions.

### Gift Planning

Related terms: planned giving, legacy giving

Explanation: A strategic approach that assists donors in structuring charitable contributions as part of their long-term financial plans, often through instruments like bequests, charitable trusts, or annuities. Example:

A donor sets up a charitable remainder trust that provides them with income for life, then transfers the remaining assets to the organization upon death. Practical application: Offer educational seminars on estate planning, provide sample language for wills, and collaborate with financial advisors. Challenges: Complex legal structures, long lead times before receipt of funds, and the need for specialized staff expertise.

### Giving Levels

Related terms: donor tiers, recognition categories

Explanation: Predefined donation brackets that help segment donors, tailor acknowledgment, and encourage upward giving through clear milestones. Example: A university defines levels: Bronze (\$1 000–\$4 999), Silver (\$5 000–\$9 999), Gold (\$10 000+), each with distinct benefits. Practical application: Design tier-based communication, create exclusive events for higher levels, and publicize impact per level.

Challenges: Avoiding donor alienation if tiers feel arbitrary, ensuring benefits are sustainable, and regularly updating levels to reflect inflation.

### Impact Reporting

Related terms: outcome measurement, accountability

Explanation: The systematic presentation of how donor contributions translate into tangible results, often using metrics, stories, and visualizations. Example: A disaster relief agency produces an annual impact report showing that \$2 million funded 5 000 shelters, saving 12 000 lives. Practical application: Establish key performance indicators (KPIs), collect data throughout program delivery, and disseminate reports via email, website, and social media. Challenges: Gathering reliable data, attributing outcomes directly to donations, and presenting complex information in an accessible format.

### Major Gifts

Related terms: capital campaigns, high-net-worth donors

Explanation: Large, often transformative donations that exceed a predefined monetary threshold, typically requiring personalized cultivation and strategic solicitation. Example: A philanthropist pledges \$250 000 to endow a scholarship program, representing 20% of the campaign goal. Practical application: Assign senior staff or board members as relationship managers, develop tailored proposals, and schedule face-to-face meetings. Challenges: Identifying suitable prospects, managing long lead times, and handling donor expectations around naming rights or program influence.

### Matching Gift

Related terms: employee giving, corporate philanthropy

Explanation: A program where an employer matches an employee's charitable contribution, effectively doubling the donation and incentivizing giving. Example: A tech company matches employee donations dollar-for-dollar up to \$5 000 per year, encouraging staff to support local nonprofits. Practical application: Promote the program through internal communications, provide easy claim forms, and track matched contributions for reporting. Challenges: Complex eligibility rules, administrative burden of verification, and ensuring donors are aware of the opportunity.

### Multichannel Campaign

Related terms: integrated marketing, omnichannel strategy

Explanation: A fundraising effort that simultaneously utilizes multiple communication platforms—email, social media, direct mail, phone, events—to reach donors where they prefer to engage. Example: A nonprofit launches a “Clean Water” campaign via a coordinated email series, Facebook live events, mailed postcards, and a peer-to-peer challenge. Practical application: Align messaging across channels, use a CRM to track donor responses, and analyze channel performance to optimize spend. Challenges: Maintaining message consistency, coordinating timing across platforms, and avoiding donor fatigue from overlapping outreach.

### Peer-to-Peer Fundraising

Related terms: social fundraising, advocacy

Explanation: A model where supporters create personal fundraising pages and solicit donations from their own networks, leveraging social connections for broader reach. Example: A marathon runner registers on a charity’s platform, sets a personal goal, and shares the page on Instagram, encouraging friends to sponsor each mile. Practical application: Provide user-friendly page templates, offer incentives for top fundraisers, and embed social sharing tools. Challenges: Monitoring page compliance, ensuring brand consistency, and managing a high volume of small donations.

### Planned Giving

Related terms: gift planning, legacy philanthropy

Explanation: A fundraising avenue that enables donors to allocate a portion of their future estate, income, or assets to an organization, often through bequests, charitable gift annuities, or life-income trusts. Example: A retiree includes a bequest of 5% of their estate in their will, ensuring a future gift to the organization. Practical application: Develop informational brochures, host estate-planning workshops, and maintain a database of interested prospects. Challenges: Long time horizon before receipt, complex legal considerations, and the need for specialized staff training.

### Prospect Research

Related terms: donor intelligence, wealth screening

Explanation: The systematic gathering and analysis of information about potential donors to assess capacity, affinity, and likelihood of giving. It informs acquisition and cultivation strategies. Example: Using a wealth-screening tool, a nonprofit identifies a local business owner with a net worth of \$10 million and a history of supporting education initiatives. Practical application: Compile prospect profiles, rank them using a scoring model, and share insights with fundraising teams. Challenges: Data accuracy, privacy concerns, and integrating research findings into the CRM workflow.

### Prospect Pipeline

Related terms: funnel management, lead tracking

Explanation: A visual or digital representation of prospects at various stages—from identification to solicitation—allowing fundraisers to monitor progress and allocate resources. Example: A nonprofit’s

pipeline shows 200 identified prospects, 80 qualified, 30 cultivated, and 12 solicited for major gifts. Practical application: Use a CRM to track movement, set stage-specific actions, and review pipeline health quarterly. Challenges: Data entry discipline, avoiding bottlenecks at specific stages, and ensuring the pipeline reflects real-time status.

### Recurring Gift

Related terms: annual giving, subscription model

Explanation: A donation that is automatically charged to a donor's chosen payment method at regular intervals (monthly, quarterly, or annually), providing steady cash flow. Example: A donor enrolls in a monthly giving program, contributing \$50 each month toward a youth mentorship initiative. Practical application: Offer easy online enrollment, send regular impact updates, and provide recognition for long-term supporters. Challenges: Managing churn, handling payment failures, and maintaining donor engagement without over-communicating.

### Return on Investment (ROI)

Related terms: cost-per-dollar, efficiency ratio

Explanation: A metric that compares the financial cost of a fundraising activity to the revenue it generates, expressed as a percentage or ratio. Example: A direct-mail campaign costs \$30 000 and raises \$120 000, yielding an ROI of 300%. Practical application: Track expenses and revenues per campaign, benchmark against industry standards, and prioritize high-ROI tactics. Challenges: Allocating indirect costs, capturing all revenue sources, and interpreting ROI for long-term relationship building where immediate returns are low.

### Stewardship Plan

Related terms: donor retention, relationship management

Explanation: A structured strategy for acknowledging gifts, communicating impact, and nurturing donors over time to foster loyalty and future support. Example: After a donor's first contribution, the organization sends a handwritten thank-you, followed by a quarterly impact newsletter and an invitation to an annual donor appreciation dinner. Practical application: Develop timelines for acknowledgment, personalize communications, and integrate stewardship activities into the CRM. Challenges: Scaling personalized stewardship for large donor bases, ensuring timely acknowledgments, and measuring the plan's effectiveness.

### Target Audience

Related terms: segmentation, prospect profiling

Explanation: The specific group of individuals or organizations that a fundraising campaign aims to reach, defined by demographics, interests, capacity, and affinity. Example: A wildlife conservation group targets outdoor enthusiasts aged 30-45 who have previously donated to environmental causes. Practical application: Conduct market research, create audience personas, and tailor messaging to resonate with each segment. Challenges: Over-generalizing segments, misaligning messaging with audience values, and neglecting emerging donor demographics.

### Theories of Giving

Related terms: psychology of philanthropy, motivation models

Explanation: Academic frameworks that explain why individuals choose to donate, including altruism, social exchange, identity, and strategic philanthropy. Understanding these theories helps craft persuasive appeals. Example: Applying the “social identity” theory, a campaign emphasizes donor belonging to a community of climate champions. Practical application: Incorporate motivational triggers—such as empathy, social proof, or legacy—into solicitation letters and digital ads. Challenges: Translating abstract theory into concrete messaging, avoiding assumptions about donor motives, and measuring the impact of theory-based tactics.

### Transparency

Related terms: accountability, trust building

Explanation: The practice of openly sharing financial data, program outcomes, and governance information with donors and stakeholders, reinforcing credibility. Example: A nonprofit publishes an interactive dashboard showing fund allocation percentages and project timelines. Practical application: Include financial summaries in annual reports, respond promptly to donor inquiries, and disclose any conflicts of interest. Challenges: Balancing openness with privacy concerns, presenting complex data clearly, and maintaining transparency during periods of financial strain.

### Volunteer Fundraising

Related terms: peer-to-peer, community engagement

Explanation: Leveraging volunteers to solicit donations on behalf of the organization, often through personal networks, events, or advocacy campaigns. Example: A community health clinic trains volunteers to host “health nights” where attendees donate to support free clinic services. Practical application: Provide volunteers with scripts, fundraising kits, and tracking tools to record contributions. Challenges: Ensuring volunteers represent the brand appropriately, providing adequate training, and managing compliance with solicitation regulations.

### Wealth Screening

Related terms: prospect research, capacity assessment

Explanation: A data-driven process that estimates a potential donor’s financial ability to give, often using public records, credit data, and proprietary algorithms. Example: A nonprofit uses a third-party service to assign a “wealth score” of 7 (out of 10) to a local entrepreneur, indicating high giving potential. Practical application: Prioritize high-score prospects for major-gift cultivation, and update scores annually to reflect changes in wealth. Challenges: Data privacy regulations, potential inaccuracies, and the risk of alienating donors if perceived as intrusive.

### Yield Management

Related terms: campaign optimization, resource allocation

Explanation: The strategic adjustment of fundraising tactics based on performance data, aiming to maximize revenue while minimizing cost. It involves testing, analyzing, and reallocating resources to the most effective channels. Example: After A/B testing two email subject lines, a nonprofit shifts its email budget toward the

higher-open-rate version, increasing overall donations by 12%. Practical application: Set up dashboards to monitor key metrics, conduct regular performance reviews, and experiment with messaging or timing. Challenges: Data overload, ensuring statistical significance, and maintaining donor experience quality while optimizing for efficiency.

### Zero-Based Budgeting

Related terms: financial planning, cost control

Explanation: A budgeting approach where each expense must be justified for each new period, rather than assuming prior spending will continue, fostering fiscal discipline in fundraising operations. Example: A charity's fundraising department reviews every line item for the upcoming fiscal year, removing underperforming software subscriptions. Practical application: Conduct quarterly reviews, involve cross-functional teams in justification, and align budget items with strategic goals. Challenges: Time-intensive analysis, potential resistance from staff accustomed to incremental budgeting, and risk of cutting essential resources.

### Annual Campaign

Related terms: fundraising drive, giving season

Explanation: A coordinated, time-bound fundraising effort typically conducted once per year, focusing on a specific theme or need and mobilizing the entire donor base. Example: A university's "Capital Year" campaign runs from January to March, aiming to raise \$10 million for new research facilities. Practical application: Develop a master timeline, integrate multiple channels, and set clear milestones for progress tracking. Challenges: Donor fatigue from overlapping campaigns, aligning internal resources, and measuring success beyond immediate revenue.

### Base Donor

Related terms: core supporters, steady givers

Explanation: Donors who consistently give at a predictable level over multiple years, forming the financial foundation of many nonprofit budgets. Example: A museum's base donors contribute \$50 each month, collectively accounting for 45% of annual operating income. Practical application: Prioritize retention efforts for base donors, provide exclusive updates, and recognize their stability in stewardship communications. Challenges: Preventing complacency, encouraging upward giving without alienating, and protecting the base against economic downturns.

### Capital Campaign

Related terms: major gifts, building fund

Explanation: A focused, multi-year fundraising effort designed to raise a substantial sum for a specific, often irreversible, project such as constructing a facility or establishing an endowment. Example: A children's hospital launches a \$50 million capital campaign to build a new pediatric wing. Practical application: Conduct feasibility studies, segment donors by capacity, and stage the campaign into quiet and public phases. Challenges: Long lead times, high resource demands, and the need to secure lead gifts before public launch.

### Donor Database

Related terms: CRM, data management

Explanation: A centralized repository that stores donor contact information, giving history, communication preferences, and engagement metrics, enabling targeted fundraising actions. Example: An organization uses a cloud-based CRM to track every interaction, from email opens to event attendance, for each donor.

Practical application: Regularly cleanse data, segment lists for personalized outreach, and generate reports to inform strategy. Challenges: Data duplication, maintaining privacy compliance, and ensuring staff adoption of consistent data entry practices.

### Donor Segmentation

Related terms: target audience, personalization

Explanation: The process of dividing donors into distinct groups based on criteria such as giving level, frequency, interests, or demographics, to tailor communications and appeals. Example: A charity segments donors into "new", "loyal", and "lapsed" categories, each receiving different messaging. Practical application: Use the donor database to create dynamic segments, automate targeted email flows, and test messaging variations. Challenges: Over-segmentation leading to complexity, outdated segmentation criteria, and balancing personalization with resource constraints.

### Donor Acquisition Cost (DAC)

Related terms: cost per donor, efficiency metric

Explanation: The total expense incurred to secure a new donor, including marketing, staff time, and overhead, divided by the number of new donors acquired. Example: An organization spends \$25 000 on a digital campaign and gains 200 new donors, resulting in a DAC of \$125. Practical application: Track DAC across channels, compare against donor lifetime value, and adjust tactics to improve cost efficiency.

Challenges: Accurately allocating shared costs, fluctuating acquisition rates, and reconciling short-term DAC with long-term donor value.

### Donor Lifetime Value (LTV)

Related terms: retention rate, value modeling

Explanation: An estimate of the total net revenue a donor is expected to generate for an organization over the span of their relationship, factoring in frequency, average gift, and retention. Example: A donor who gives \$200 annually with an average retention of 8 years yields an LTV of \$1 600. Practical application: Use LTV to prioritize stewardship resources, justify acquisition spend, and segment donors for tailored cultivation. Challenges: Predicting future giving behavior, accounting for inflation, and integrating LTV into budgeting decisions.

### Donor Recognition

Related terms: stewardship, acknowledgment

Explanation: The practice of publicly or privately thanking donors for their contributions, often through naming opportunities, events, or personalized communications. Example: A donor's name appears on a plaque honoring a new classroom wing, and they receive a private tour of the facility. Practical application:

Develop tiered recognition programs, maintain a donor wall, and ensure timely acknowledgment. Challenges: Managing expectations for recognition, avoiding perceptions of “buy-in” influence, and updating recognition materials as campaigns evolve.

#### Donor Survey

Related terms: feedback loop, impact assessment

Explanation: A structured questionnaire sent to donors to gauge satisfaction, motivations, preferences, and suggestions for improvement, informing future fundraising strategies. Example: After a campaign, a nonprofit surveys donors, discovering that 70% value impact stories more than financial reports. Practical application: Design concise surveys, incentivize completion, and integrate findings into stewardship plans. Challenges: Low response rates, survey fatigue, and translating qualitative feedback into actionable changes.

#### Donor Trust

Related terms: transparency, credibility

Explanation: The confidence donors have in an organization’s ability to responsibly manage funds, deliver promised outcomes, and act ethically. Trust is a critical predictor of giving behavior. Example: A charity maintains high donor trust by publishing audited financial statements and third-party impact evaluations. Practical application: Communicate openly about challenges, honor commitments, and foster two-way dialogue with donors. Challenges: Recovering trust after a scandal, addressing misinformation, and balancing openness with strategic discretion.

#### Event Fundraising

Related terms: galas, peer-to-peer

Explanation: Generating revenue through organized gatherings—such as galas, auctions, walks, or concerts—where attendees contribute via ticket sales, sponsorships, or donations. Example: A charity hosts a charity run, raising \$75,000 through participant fees, corporate sponsorships, and on-site donations. Practical application: Create detailed event budgets, secure in-kind donations, and leverage event media for post-event follow-up. Challenges: High upfront costs, unpredictable attendance, and logistical complexities that can divert staff focus from core programs.

#### Fundraising Funnel

Related terms: prospect pipeline, conversion rate

Explanation: A visual representation of the stages donors move through—from awareness to commitment—highlighting attrition points and conversion opportunities. Example: A nonprofit’s funnel shows 5,000 website visitors, 500 sign-ups, 200 first-time donors, and 50 recurring donors. Practical application: Identify bottlenecks, implement targeted interventions at each stage, and track metrics to improve overall conversion. Challenges: Data fragmentation across channels, inaccurate stage definitions, and the temptation to focus solely on top-line numbers.

#### Giving Day

Related terms: annual campaign, social fundraising

Explanation: A designated 24-hour period where a nonprofit concentrates outreach, social media activity, and donation appeals to create urgency and momentum. Example: On “Global Giving Day,” a charity sees a 300% spike in online donations compared to the previous week. Practical application: Build a countdown calendar, mobilize ambassadors, and provide real-time donation tracking dashboards. Challenges: Overreliance on a single day for revenue, coordinating volunteers, and ensuring post-day follow-up to retain new donors.

### Grant Management

Related terms: funding compliance, reporting

Explanation: The systematic process of identifying grant opportunities, submitting proposals, managing awarded funds, and fulfilling reporting obligations. Example: A nonprofit secures a \$200,000 grant, tracks expenditures against the approved budget, and submits a final impact report within the stipulated timeline. Practical application: Use grant-tracking software, assign a grant manager, and maintain a calendar of deadlines. Challenges: Complex application requirements, strict compliance monitoring, and aligning grant deliverables with organizational priorities.

### Impact Metrics

Related terms: outcome measurement, KPIs

Explanation: Quantitative indicators that demonstrate the effectiveness of programs and the value generated by donor contributions, such as lives saved, jobs created, or carbon reduced. Example: A literacy program reports that each \$100 donation results in 20 children achieving reading proficiency. Practical application: Define clear metrics before program launch, collect data regularly, and report progress to donors in accessible formats. Challenges: Attribution difficulties, data collection costs, and translating numbers into compelling narratives.

### Leadership Giving

Related terms: major gifts, board fundraising

Explanation: Contributions made by senior executives, board members, or influential community leaders, often serving as a signal to other donors and enhancing campaign credibility. Example: The CEO of a tech firm donates \$250,000 to a university research fund, inspiring additional corporate contributions. Practical application: Engage leaders early, provide tailored impact briefings, and recognize their gifts publicly where appropriate. Challenges: Managing expectations of influence, avoiding perceived conflicts of interest, and ensuring leadership gifts are integrated into broader fundraising plans.

### Matching Grant

Related terms: challenge grant, donor incentive

Explanation: A grant that matches donations made by individuals or other donors, effectively doubling the impact of each contribution during a specified period. Example: A foundation offers a \$500,000 matching grant for a clean-water campaign, encouraging individual donors to give before the match expires. Practical application: Promote the matching deadline, track progress toward the match, and communicate the

amplified impact to donors. Challenges: Time-sensitive pressure can cause donor fatigue, administrative tracking of matched funds, and ensuring the match is fulfilled.

#### Online Giving Platform

Related terms: digital fundraising, payment gateway

Explanation: A web-based service that enables donors to make secure, instantaneous contributions via credit cards, ACH, or mobile wallets, often featuring donor dashboards and recurring gift options. Example: A nonprofit integrates a platform that allows donors to track their giving history, set up monthly donations, and share their support on social media. Practical application: Choose a platform that integrates with the CRM, ensure PCI compliance, and optimize the donation page for mobile devices. Challenges: Platform fees, data ownership concerns, and maintaining a seamless user experience across devices.

#### Peer Advocacy

Related terms: volunteer fundraising, social proof

Explanation: When existing supporters actively promote an organization's cause within their personal networks, leveraging trust and shared values to attract new donors. Example: A long-time donor posts a personal story about volunteering, encouraging friends to donate through a shared link. Practical application: Equip advocates with toolkits, encourage storytelling, and recognize top advocates publicly. Challenges: Measuring the direct impact of advocacy, ensuring message consistency, and preventing over-reliance on a few vocal supporters.

#### Planned Giving Officer

Related terms: gift planning, legacy philanthropy

Explanation: A fundraising professional specializing in cultivating relationships with donors interested in long-term, often post-humous, contributions such as bequests, charitable trusts, or annuities. Example: The officer meets with retirees to discuss how a charitable remainder trust can provide both income and a lasting legacy. Practical application: Conduct targeted outreach, develop educational materials, and collaborate with legal counsel to structure gifts. Challenges: Long sales cycles, complex tax considerations, and the need for deep financial literacy.

#### Prospect Scoring

Related terms: wealth screening, capacity assessment

Explanation: A quantitative method that assigns a numeric value to each potential donor based on criteria such as wealth, affinity, and engagement, helping prioritize outreach efforts. Example: A prospect receives a score of 85 out of 100, indicating high capacity and strong alignment with the organization's mission. Practical application: Build a scoring model in the CRM, update scores regularly, and allocate major-gift resources to top-scoring prospects. Challenges: Weighting criteria appropriately, avoiding bias, and ensuring scores reflect real-time changes in donor circumstances.

#### Recurring Donation Incentive

Related terms: donor retention, loyalty program

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Explanation: Benefits or recognitions offered to donors who commit to ongoing contributions, designed to encourage sustained giving and increase average gift size. Example: A museum offers a "Patron Circle" badge and early exhibition previews to members who set up monthly donations. Practical application: Create tiered incentive structures, communicate benefits clearly, and track renewal rates. Challenges: Balancing cost of incentives with incremental revenue, preventing perception of "pay-to-play," and maintaining incentive relevance over time.

#### Segmented Outreach

Related terms: donor segmentation, personalization

Explanation: Tailoring communication strategies to specific donor groups based on shared characteristics, ensuring relevance and increasing engagement likelihood. Example: A nonprofit sends a different email series to corporate donors (highlighting brand exposure) versus individual donors (emphasizing personal impact). Practical application: Develop content libraries for each segment, automate delivery through the CRM, and monitor segment-specific response metrics. Challenges: Managing content proliferation, ensuring data accuracy for segment definitions, and avoiding over-segmentation that dilutes messaging.

#### Stewardship Calendar

Related terms: donor journey, relationship management

Explanation: A schedule that outlines key dates for donor acknowledgments, impact updates, and engagement activities throughout the year, ensuring consistent and timely communication. Example: The calendar marks the anniversary of each donor's first gift, prompting a personalized thank-you note and impact story. Practical application: Use the CRM to generate automated reminders, assign staff responsibilities, and track completion of each stewardship touchpoint.