STRETCHLEARN · WORKBOOK

Nonprofit Fundraising & Donor Relations — Workbook

This workbook turns the course into a working fundraising plan for your organization. You will build a qualified prospect list, draft a case for support, design a year of segmented appeals, plan a major-gift solicitation, and stand up a stewardship and metrics system. Work through one section per module, then use the action plan and editable templates to put it all into practice.

The Donor Pyramid and Finding Your Prospects

Map your current giving base and build a short, qualified list of prospects worth your time.

Exercise: Build Your Donor Pyramid

Pull a list of every individual donor from the last 12 months and sort it by total amount given, largest at the top. Then answer the prompts to see how concentrated your revenue really is.

• How many total individual donors do you have, and what did they give in total?

• What share of your total individual revenue came from your top 10 to 15 percent of donors?

• How many donors sit at the very top (your largest gifts), and what do they give combined?

• Based on this distribution, where should you spend your limited personal time, and where should efficient mass appeals do the work?

Worksheet: LAI Prospect Qualification Worksheet

List up to 10 potential major-gift prospects, one per row, and rate each on Linkage, Ability, and Inclination. Only names that score on all three are qualified prospects.

Prospect name

Linkage (who connects them to us, or none)

Ability (estimated capacity / wealth signal)

Inclination (prior giving, volunteering, or interest)

Qualified? (yes only if all three present)

Suggested next step

Checklist: Prospect Research Setup

[ ] Export and sort your own donor database by lifetime giving, recency, frequency, and largest gift
[ ] Identify your most loyal multi-year donors as bequest and upgrade prospects
[ ] Choose one wealth-screening or research tool to start with (DonorSearch, iWave, or WealthEngine)

[ ] Check free public sources (county property records, SEC, FEC) for top prospects
[ ] Create a do-not-solicit / do-not-research flag in your CRM and apply it where requested
[ ] Write a one-paragraph prospect-research confidentiality policy aligned with Apra and AFP ethics

Annual Giving and the Case for Support

Write the argument for giving and design a year of segmented, well-timed appeals plus a recurring-gift program.

Exercise: Draft Your Case for Support

Write two to three sentences for each element below. Keep the focus on the person you serve and the donor as the hero, not on your organization's internal needs.

• The problem: describe one real person or situation your organization exists to help.

• The urgency: why does this need attention now rather than someday?

• The gift impact: translate three dollar amounts into specific outcomes (for example, 50 dollars provides...).

• The call to action: write the exact sentence asking for a specific gift for a specific purpose.

Worksheet: Annual Appeal Segmentation Planner

For each donor segment, define the message angle, the suggested ask amount logic, and the channel and timing. Use this to plan a full year of appeals.

Segment (new / active / lapsed / mid-level / monthly)

Number of donors in segment

Message angle (welcome, upgrade, win-back, etc.)

Ask amount logic (e.g., last gift plus 15 percent)

Channel (mail / email / phone / event)

Send month / timing

Exercise: Design Your Monthly Giving Program

Plan a sustaining-donor program using the lifetime-value logic from the course. Calculate the numbers before you launch.

• Name your monthly program and write the one-sentence ask that frames it around impact and ease.

• Pick a target conversion rate and apply it to your current donor count: how many monthly donors and how much annual revenue would that create?

• Estimate lifetime value for a monthly donor (average monthly gift times 12 times expected years) versus a one-time donor.

• Describe how you will recover failed payments from expired cards automatically.

Checklist: Annual Giving Program Readiness

[ ] Master case for support written and approved
[ ] Donor file segmented into at least new, active, lapsed, and mid-level
[ ] Ask-amount arrays anchored to each donor's last gift
[ ] Appeal calendar set with spring, fall, and year-end pushes plus GivingTuesday
[ ] Monthly giving option visible and emphasized on every donation form
[ ] Automated failed-payment (card update) recovery process turned on

Major Gifts and Choosing Your Revenue Mix

Plan a major-gift cultivation and solicitation, and assess your revenue mix for concentration risk.

Worksheet: Major Gift Move Plan

Choose one qualified prospect and map their journey through the donor cycle. Fill in concrete moves and dates, not vague intentions.

Prospect name and current giving level

Cycle stage (qualification / cultivation / solicitation)

Next 3 cultivation moves and target dates

Who will make the ask (peer / ED / board member)

Target ask amount and specific purpose

Planned solicitation date

Exercise: Rehearse the Ask

Write out your solicitation conversation word for word, then practice it aloud with a colleague. The goal is to be specific and then comfortable with silence.

• Write your opening that leads with relationship and gratitude, not business.

• Write the exact ask sentence: a specific dollar amount for a specific purpose.

• List the two most likely objections and your honest response to each.

• What is your plan for staying silent after the ask, and what will you do if the donor offers less than you asked?

Worksheet: Revenue Mix and Concentration Check

List your major revenue sources and their share of total budget. Flag any single funder above roughly one third as a concentration risk.

Revenue source / funder name

Type (individual / foundation grant / government / corporate / events)

Restricted or unrestricted

Annual amount

Percent of total budget

Concentration risk flag (yes if over ~33 percent)

Checklist: Healthy Revenue Mix Review

[ ] No single funder exceeds roughly 25 to 33 percent of the budget
[ ] A meaningful share of revenue is unrestricted individual giving
[ ] Cost to raise a dollar is tracked by channel
[ ] Time-limited grants have a plan for what replaces them when they end
[ ] Major-gift prospects have written move plans, not just a wish list
[ ] Board members are recruited and prepared to join asks

Stewardship, Retention, and Measuring Success

Build the thank-you, impact, and metrics systems that keep donors and prove the program is healthy.

Worksheet: Stewardship Calendar Worksheet

Map every touch a typical donor receives across a year so contact is frequent but not always an ask. Aim for several non-ask touches per solicitation.

Month

Touch type (thank-you / impact report / invitation / ask)

Channel (call / handwritten note / email / mail / event)

Segment receiving it

Owner responsible

Exercise: Calculate Your Retention and Lifetime Value

Use last year's and this year's donor lists to compute your real retention, then estimate lifetime value. These two numbers should anchor your board reporting.

• Overall retention: of donors who gave last year, what percent gave again this year?

• First-time donor retention: of last year's new donors, what percent gave a second gift?

• Estimate average donor lifespan from your retention rate and multiply by average annual gift to get lifetime value.

• What one change (welcome series, 48-hour thanks, soft second ask) will you make to lift second-gift conversion?

Checklist: Donor-Centered Stewardship Standards

[ ] Personal thank-you sent within 48 hours for meaningful gifts
[ ] Thank-you references the gift amount, designation, and intended impact
[ ] An impact report closes the loop weeks or months after the gift
[ ] Board members make thank-you calls for major gifts
[ ] Anonymity and recognition preferences are recorded and honored
[ ] Several non-ask touches are scheduled for every solicitation

Worksheet: Board Fundraising Dashboard Builder

Define each core metric, its current value, prior-year value, and benchmark. Keep the whole dashboard to one page so the board sees trend at a glance.

Metric (retention / acquisition / average gift / cost to raise a dollar / revenue concentration / lifetime value)

Current value

Prior-year value

Sector benchmark

Trend (up / down / flat) and action implied

Your Action Plan

1. Export your donor file and build your donor pyramid to see who really funds you
2. Qualify your top prospects with the LAI worksheet and pick the 10 to 20 worth personal attention
3. Write and approve a master case for support focused on the person served and the donor as hero
4. Segment your donor list and lay out a full year of appeals with anchored ask amounts and clear timing
5. Launch or strengthen a named monthly giving program and turn on failed-payment recovery
6. Choose one major-gift prospect, write a move plan, and schedule the first cultivation contact
7. Rehearse your ask aloud, including the specific amount and your plan to stay silent afterward
8. Run a revenue-mix concentration check and flag any funder over a third of the budget
9. Stand up a stewardship system: 48-hour thanks, impact reports, and a balanced touch calendar
10. Build a one-page board dashboard with retention, acquisition, cost to raise a dollar, and concentration