



# **Fundraising and Donor Development Course: Major Gifts, Corporate Partnerships and Stewardship**



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### **Introduction:**

Fundraising and donor development for major gifts, corporate partnerships and stewardship is a 5-day course for development officers, major gift officers, university advancement staff and fundraising managers, ending with a Donor Development Plan for a case organisation. Many non-profits depend on a few appeals and lose most first-time donors before a second gift, while prospects able to make a major gift sit unnoticed in poorly kept donor records. Nominees already solicit, manage or report on donors and work through case studies on donor files, gift range charts and partnership proposals. CoreConcept Training Center delivers this fundraising and donor development course.

### **Course Objectives:**

- Assess an organisation's income portfolio against the donor pyramid and write a case for support that donors at each level can act on
- Apply the moves management cycle and a gift range chart to size a prospect pipeline and sequence a fundraising campaign
- Research, rate and cultivate major gift prospects and conduct a structured ask meeting with planned responses to objections
- Build corporate partnership proposals and agreements that match company social goals with organisational need
- Analyse donor CRM data with RFM segmentation, retention rate and lifetime value to target upgrades and reactivation
- Produce a Donor Development Plan that sets pipeline, partnership, retention and stewardship targets for a case organisation

### **Target Audience:**

- Managers responsible for individual giving, annual fund and donor acquisition in non-profit organisations
  - Officers who hold a portfolio of major gift prospects and lead cultivation and ask meetings
  - Advancement managers in universities and schools responsible for alumni and friends giving
  - Partnership managers who secure and renew company sponsorship, matching gifts and social investment
  - Donor relations and data managers accountable for the donor database, gift processing and stewardship reporting
  - Development managers in foundations and endowments who raise funds from private donors
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## **Course Outline:**

### **Day 1: Donor Development Landscape and Income Portfolio Baseline**

- Donor Pyramid From Annual Gifts to Principal Gifts
- Income Portfolio Review by Source, Size and Trend
- Case for Support Drafting With Need, Solution and Impact
- Donor Motivation and Giving Behaviour Segments
- Fundraising Function Self-Assessment and Gap Ranking

### **Day 2: Moves Management, Pipeline Models and Campaign Frameworks**

- Moves Management Cycle From Identification to Stewardship
- Prospect Pipeline Stages, Conversion Rates and Portfolio Sizing
- Gift Range Chart for a Capital or Endowment Campaign
- Quiet Phase and Public Phase Campaign Sequencing
- Corporate Giving Models Including Sponsorship and Matching Gifts

### **Day 3: Major Gift Cultivation, Solicitation and Corporate Partnership Building**

- Prospect Research Profile With Capacity and Affinity Ratings
- Cultivation Plan Built From Planned Donor Moves
- Major Gift Ask Meeting Structure and Objection Handling
- Corporate Partnership Proposal Aligned to Company Social Goals
- Partnership Agreement Terms, Recognition Rights and Exit Clauses

### **Day 4: Donor CRM Analytics, Stewardship Metrics and Problem Cases**

- Donor CRM Record Standards, Gift Coding and Data Hygiene
- RFM Segmentation and Lapsed Donor Reactivation Lists
- Donor Retention Rate, Lifetime Value and Upgrade Tracking
- Stewardship Matrix With Recognition Levels and Impact Reports
- Gift Acceptance Policy for Reputational and Conflicting Gifts

### **Day 5: Case Study Work on the Donor Development Plan**

- Case Organisation Brief With Donor File and Income Data
  - Case Pipeline Build and Top Prospect Cultivation Plans
  - Case Corporate Partner Shortlist and Proposal Outline
  - Case Retention Targets and Stewardship Calendar
  - Donor Development Plan Completion and Peer Challenge
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## **Skills You Will Gain:**

- Case for Support Writing
- Prospect Research and Rating
- Moves Management
- Major Gift Solicitation
- Corporate Partnership Negotiation
- Donor Data Segmentation
- Donor Retention Analysis
- Donor Stewardship Planning

## **Why Attend This Course:**

- Present a Donor Development Plan to the head of development or executive director for approval and resourcing
- Decide which prospects receive a major gift ask, which companies to approach and which lapsed donors to reactivate first
- Avoid lost second gifts, stalled prospects and partnership deals that end without renewal because no one owned the next move
- Coach colleagues with the prospect profile template, cultivation plan format and stewardship matrix used during the course

## **Conclusion:**

Back at work, the participant presents the Donor Development Plan to the head of development, the executive director or the advancement committee. Leadership uses it to agree which prospects enter the major gift portfolio, which company partnerships to pursue, what retention and upgrade targets to set and how stewardship will be resourced. After the first two quarters, the unit should compare pipeline movement, ask results, partnership renewals and donor retention against the plan and revise the targets and moves that have not delivered.

## **Frequently Asked Questions FAQ:**

### **What should participants know before a fundraising and donor development course on major gifts and corporate partnerships?**

Participants should already work with donors, prospects or company partners and be able to read a donor report or income summary. Bringing anonymised donor data, a current case for support or a partnership proposal helps during the case study day.

## **How does fundraising and donor development differ from a grant management course?**

This course centres on raising money from individuals and companies: prospect research, cultivation, asks, corporate partnerships, donor data and stewardship. Grant management courses cover running funded projects once an award is made, including budgets, compliance and reports to institutional funders.

## **Why does fundraising and donor development focus on donor retention as much as acquisition?**

Retained donors cost less to keep than new donors cost to find, and most major gifts come from people who have given before. Tracking retention, upgrades and stewardship protects future income and builds the pipeline of major gift prospects.

## **What do participants take back from the fundraising and donor development course?**

Participants take back a Donor Development Plan with a pipeline model, prospect cultivation plans, a corporate partner shortlist, retention and upgrade targets and a stewardship calendar they can adapt to their own organisation.

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