How Nonprofits Endure:

Balancing Strategy, Data and Operations

SESSION 2: BUILD DIRECTION:

USING INSIGHTS TO GUIDE GROWTH

AUGUST 27, 2026

WHAT TO EXPECT TODAY

Using Insights to Guide Growth

1. How donor intelligence informs organizational priorities and fundraising decisions
2. Why fundraising strategies fail when activity is not sequenced
3. How to set realistic revenue targets based on capacity, affinity and readiness
4. How to align stakeholders around one shared roadmap

WELCOME

Today's Presenters

Yuki Mosher

Development Officer

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WHO WE ARE

Firm Overview

armanino

Employees	Team Members in	Firm Ranking
2700+	41 States	20th Largest

Canada
Vancouver

India
Ahmedabad
Hyderabad

California
San Ramon
Century City
El Segundo
Irvine
Los Angeles
San Francisco
San Jose
Woodland Hills

Colorado
Denver

Florida
Boca Raton

Georgia
Atlanta
Brunswick
Duluth

Idaho
Boise

Illinois
Chicago

Missouri
St. Louis
St. Charles

New York
New York City
Garden City
White Plains

Pennsylvania
Philadelphia
Scranton

Tennessee
Nashville

Texas
Austin
Dallas

Utah
Salt Lake City

Washington
Bellevue

Welcome back!

Session 1: Build Clarity — Turning Fundraising Data into Leadership Insights

- Revenue growth alone does not indicate health. Retention, donor count, revenue concentration and mix reveal if growth is sustainable.
- Reliable decisions require a trusted baseline. Data must be accurate, consistent, reconciled and supported by shared definitions.
- Look beyond what changed to understand why. Analytics should surface root causes, risks, opportunities and organizational constraints.

PARTICIPANT POLLING QUESTION

When was the last time you performed a wealth screening on your donor base?

More than 5 years ago	9%
We never have	58%
Within the past 5 years	15%
Within the past year	18%

BUILD DIRECTION

The Philanthropic Landscape

Growing, but Unevenly

Sector growth does not guarantee organizational growth.

WHAT IS CHANGING:

- Total giving in 2025 surpassed $600 billion for the first time, growing 5.7% YOY
- K-Shaped Philanthropy:
    - Donors who give from their assets are giving more
    - Donors who give from their income are giving less
- OBBBA
    - Sophisticated donors set up and/or poured assets into a DAF to avoid the new AGI floor and cap on top-bracket deductions
    - Corporate giving likely to decrease as a percentage of revenue
- The Great Wealth Transfer is happening, but at a slower pace than anticipated

Giving USA 2026

More Dollars From Fewer Donors

Revenue can rise while the underlying donor base becomes less resilient.

0.8%

DONOR COUNT

The overall donor pool continues to shrink.

4.3%

DOLLARS RAISED

Growth is being carried by a smaller group of donors giving more.

0%

RETENTION

Retention has plateaued, but too early to celebrate. Converting new donors to repeat donors is still a challenge

BUILD DIRECTION

Donor Intelligence: Turning Insight Into Organizational Direction

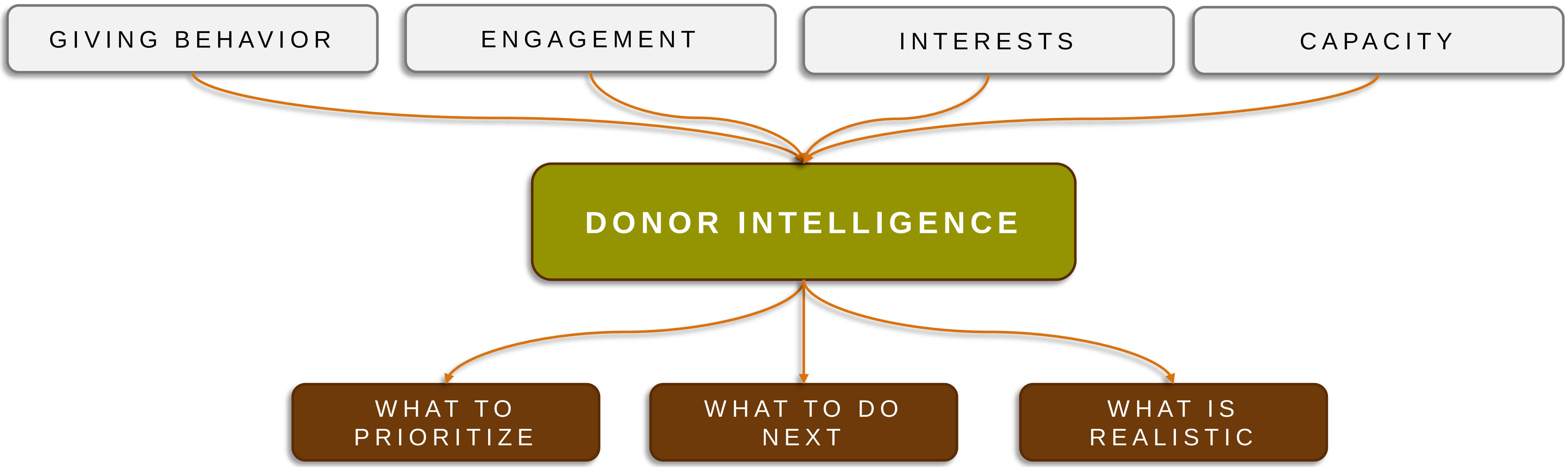
PARTICIPANT POLLING QUESTION

When you hear “donor intelligence,” what comes to mind first?

A. Wealth and giving capacity
B. Giving history and CRM data
C. Donor interests and engagement
D. Research and relationship insights
E. All of the above
F. I’m not sure yet

What Is Donor Intelligence?

Donor intelligence marries donor data, research and relationship insight with organizational priorities to guide strategy



TURNING INSIGHT INTO ORGANIZATIONAL DIRECTION

Where Donor Intelligence Comes From

PROGRAMS & COMMUNICATIONS

Mission connection and engagement

- Program and volunteer participation
- Events and communications
- Issues or outcomes that resonate
- Stories and evidence of impact

DEVELOPMENT

Relationship and giving history

- Gifts, pledges and giving trends
- Meetings and interactions
- Donor interests and preferences
- Portfolio stage and next moves

FINANCE & OPERATIONS

Financial accuracy and infrastructure

- Reconciled gift and pledge information
- Payment status and revenue timing
- Gift restrictions and designations
- Reliable systems, definitions and controls

LEADERSHIP & BOARD

Relationships and access

- Personal and institutional connections
- Opportunities for introductions
- Context from donor conversations
- Strategic relationships and influence

EXTERNAL RESEARCH

Additional information

- Public philanthropy
- Professional affiliations
- Wealth indicators
- Relevant life and business events

Connecting Priorities With Strategy

Donor Intelligence can be used to pressure test organizational priorities

PRIORITY

What are we trying to fund?
- Outcome
- Funding need
- Timing

DONOR EVIDENCE

Who may support it and why?
- Interests and engagement
- Giving behavior
- Relationships and capacity

CONFIDENCE

How strong is the evidence?
- Confirmed
- Inferred
- Unknown

DECISION

What should happen next?
- Prioritize
- Test and learn
- Build readiness
- Defer

We believe **[audience]** may support **[priority]** because **[evidence]**.
We still need to confirm **[information gap]**.

TURNING INSIGHT INTO ORGANIZATIONAL DIRECTION

Connecting Priorities With Opportunity

BUILD DIRECTION

Why Fundraising Strategies Fail When They Aren’t Sequenced

WHY FUNDRAISING STRATEGIES FAIL WHEN THEY AREN'T SEQUENCED

Sequencing Relationships and Giving

Bad Habits and their Outcomes

OUT OF SEQUENCE

Ask before listening

Solicit before qualifying

Request major gifts before demonstrating impact

Repeat the same ask regardless of donor readiness

Focus on campaigns instead of relationships

CONSEQUENCES

Low conversion rates

Donor fatigue

Increased attrition

Lost major gift opportunities

Frustrated fundraising staff

When It's Time to Look at Your Sequencing

Common Sequencing Failures

Asking Too Much Too Soon

Symptoms:
- Lots of introductions
- Few major gifts

Reason: The donor hasn't reached readiness.

Stewardship Neglect

Organization concludes the relationship after the gift. Donors experience: Gift → Silence

To keep the donor engaged, the sequence should look like:

Cultivation → Ask → Stewardship → Requalification → Next Ask

Endless Cultivation

Symptoms: Great relationships, no asks

Reason: Fundraisers become comfortable cultivating and hesitate to solicit.

One-Size-Fits-All Sequencing

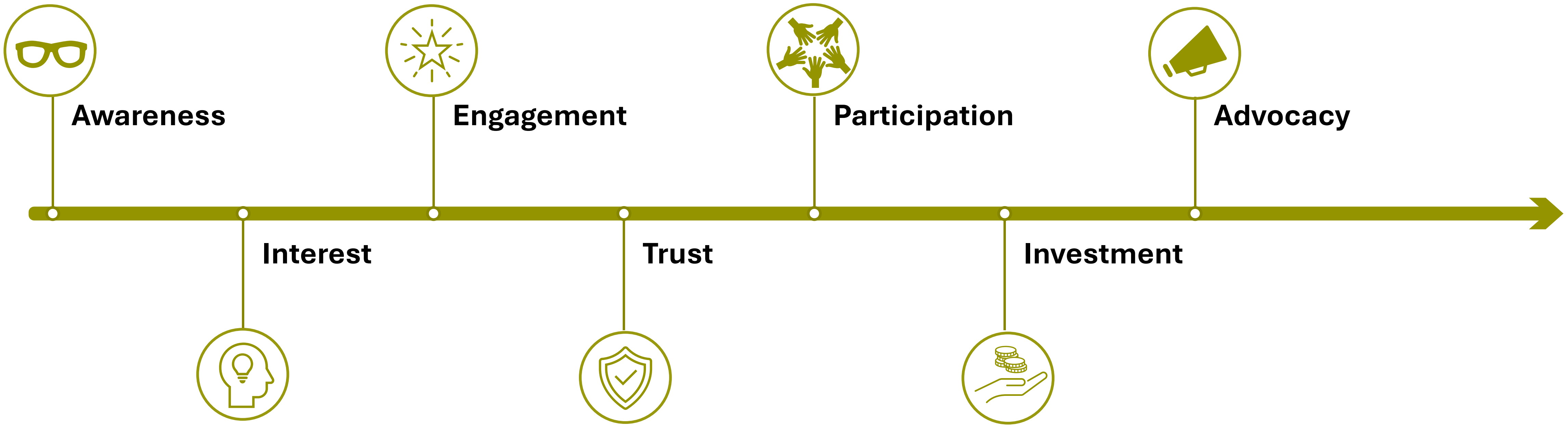
Every donor isn't ready for the same ask at the same time.

An engaged volunteer could move faster than a new prospect.

Moves should be sequenced based on donor readiness, not organizational need.

The Right Ask at the Right Time

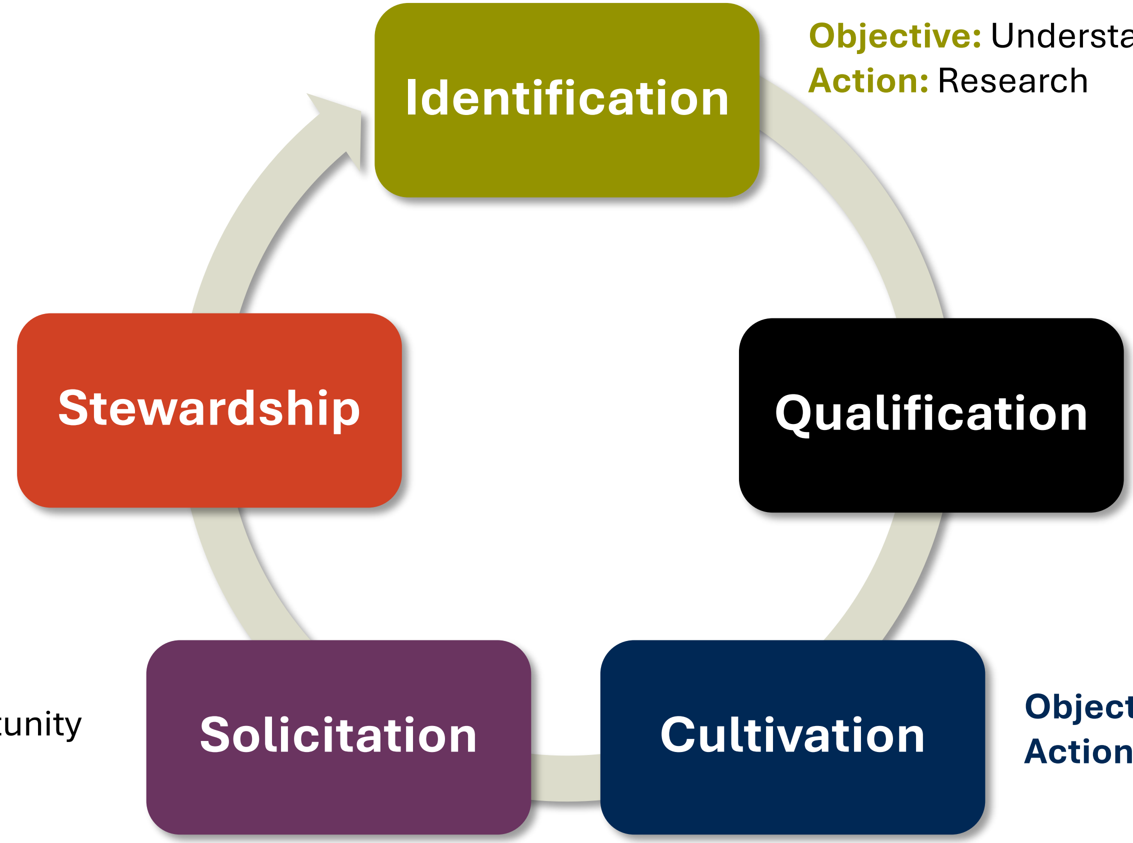
Build Donor Engagement and Commitment One Step at a Time



WHY FUNDRAISING STRATEGIES FAIL WHEN THEY AREN'T SEQUENCED

Sequencing Relationship-Building

Moves Management: Build Trust, Affinity, and Commitment



Objective: Understand potential
Action: Research

Objective: Confirm affinity and capacity
Action: Introductory conversation

Objective: Build trust and engagement
Action: Site visit, events, meetings

Objective: Present opportunity
Action: Tailored ask

Objective: Demonstrate impact
Action: Reports, recognition

The Ask Ladder: Sequencing Gifts

Build Donor Engagement and Commitment One Step at a Time

Ask 1: Attention
- Attend a webinar
- Read a report
- Visit a program

Ask 2: Engagement
- Attend an event
- Meet program staff
- Join an advisory group

Ask 3: Insight
- Donor interview
- Feedback discussion
- Strategic conversation

Ask 4: Participation
- First annual gift
- Membership
- Event sponsorship

Ask 5: Investment
- Major gift ask

Ask 6: Leadership
- Major campaign support
- Peer-to-peer introductions
- Planned giving
- Campaign cabinet participation

PARTICIPANT POLLING QUESTION

Do you use moves management to manage donor relationships?

A. Yes, moves management is an important component of our fundraising strategy

B. I’m aware of what moves management is, but we don’t use it

C. Yes, but only for major fundraising initiatives like a capital or endowment campaign

D. No or not sure – I learned about Moves Management during this webinar

E. Other

BUILD DIRECTION

How To Set Realistic Revenue Targets Tied To Capacity and Affinity

Two Perspectives

How Much Can We Count On vs. How Much Potential Is There?

Finance

Revenue Forecasting

Last Year's Actual Revenue

+ Expected Growth

+ Known Major Gifts

<u>+ Campaign Initiatives</u>

= Revenue Goal

Development

Pipeline Forecasting

Expected Revenue=

Σ (Ask Amount × Probability)

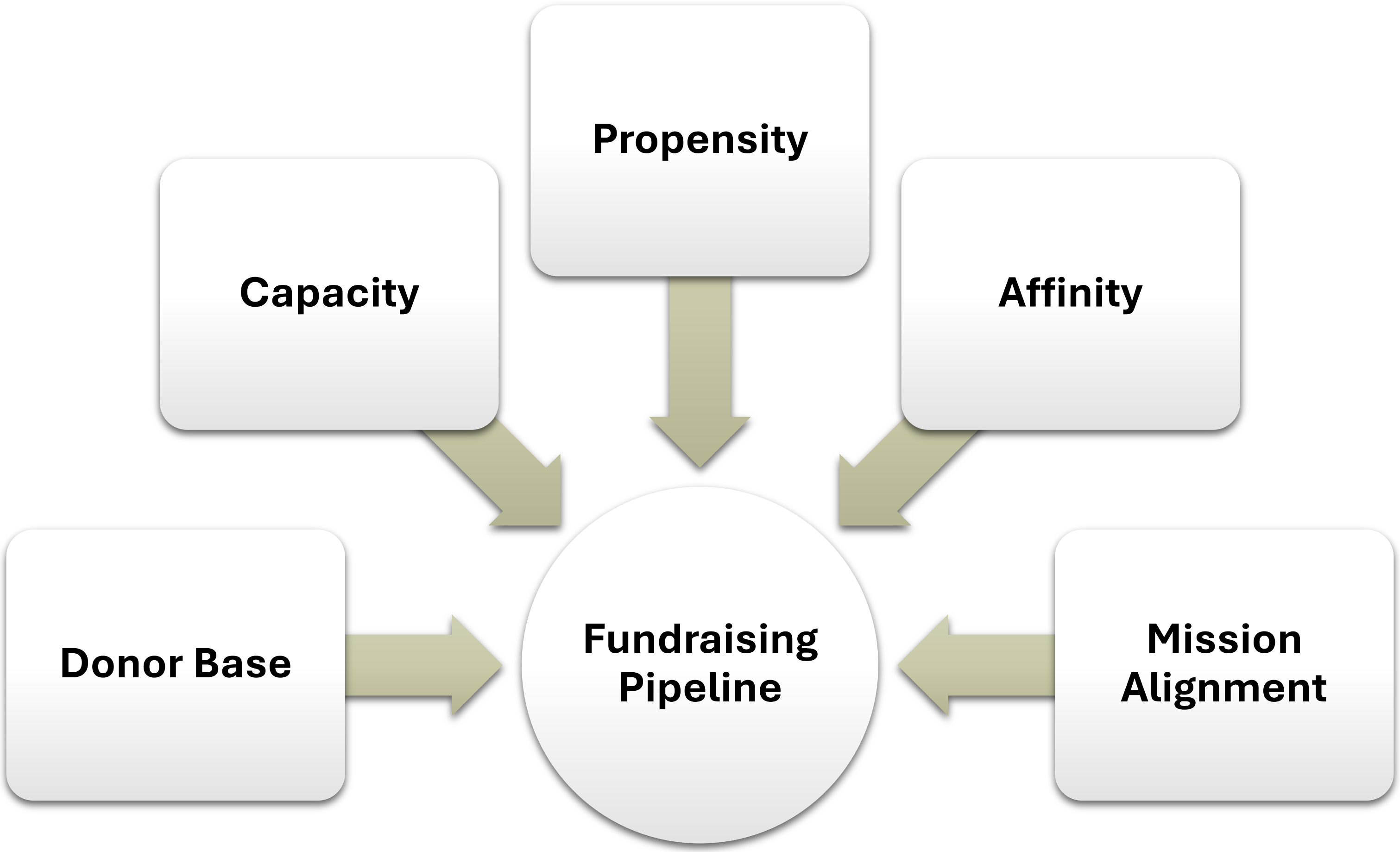
PARTICIPANT POLLING QUESTION

How do you estimate donor giving for your pipeline?

A. Increase the ask amount by a set percentage across the board for current donors, and use professional judgement for new prospects
B. Use past giving data and professional judgement on a donor-by-donor basis
C. Use donor intelligence acquired through wealth screening
D. Other

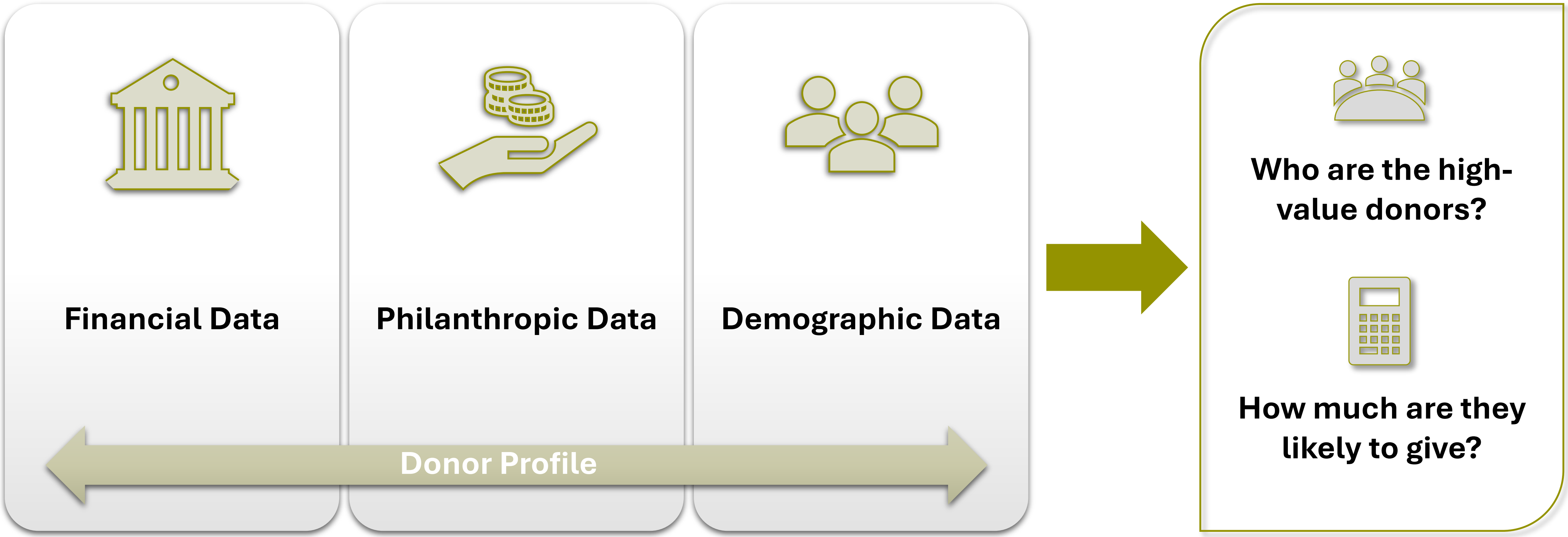
Donor Intelligence and Why It Matters

The Four Pillars of Donor Intelligence and Pipeline Forecasting



What Is Wealth Screening?

In-Depth Data on Donor Wealth and Behavior



Wealth Screening Tools

There Are Many Options

DONORSEARCH by evertrue

Kindsight

WEALTHENGINE

WINDFALL

blackbaud

bloomerang

Bonterra

donorperfect

NEON ONE

salesforce

Data Inputs

How to Use Wealth Screening Data to Assess Fundraising Potential

iWave Score
Are you and the prospect a good match?

Giving Capacity
Estimated 5-year philanthropic capacity

Propensity
Likelihood of charitable giving

Affinity
Alignment with a specific cause

RFM Score
Recency, Frequency, and Monetary value

Your Donor Base's Potential

Determine Your Pipeline Potential

1

Set a gift realization rate based on the iWave score

iWave Score	Realization Rate
4	25%
3	15%
2	5%
1	2%

2

Step 2: Estimate Revenue

Potential Revenue = 5-Year Capacity × Realization Rate

3

Apply probabilities to potential donations based on where in the Moves Management cycle the donor is in:

Stage	Probability
Identification	10%
Qualification	20%
Cultivation	40%
Solicitation	75%
Verbal Commitment	90%

4

Step 4: Calculate your 5-Year Pipeline:

5-Year Capacity × Realization Rate x Probability

Example: Meet the Donors

Estimating the Pipeline for Three Donors

Margaret

- Long-time annual donor
- 67 years-old
- Gives $500 annually
- Has attended several events
- Little direct engagement with major gifts staff

Jose

- Gives $250-$1,000 periodically
- Participates in volunteer activities
- Consistent supporter for several years
- Not currently assigned to a gift officer

Hsiao-Wen

- One-time donor
- Friend of a community member
- Gift amount: $100
- Successful attorney
- Minimal interaction with organization

Example: Wealth Screening Results

What iWave Revealed

Margaret

Capacity: $1 million over 5 years
Scores:
- iWave: 4
- Capacity: 4
- Affinity: 4
- RFM: 4

→ **Immediate major gift prospect, cultivate for planned giving**

Jose

Capacity: $500,000 over 5 years
Scores:
- iWave: 3
- Capacity: 4
- Affinity: 3
- RFM: 3

→ **Cultivate for future growth**

Hsiao-Wen

Capacity: $250,000 over 5 years
Scores:
- Wave: 2
- Capacity: 4
- Affinity: 1
- RFM: 1

→ **A “not now, but nurture” prospect**

Example: With and Without Wealth Screening

Are You Leaving Money on the Table?

Without iWave

Donor	Prior Year Giving	This Year's Ask	Pipeline Stage	Probability	Pipeline Forecast
Margaret	$500	$750	Solicitation	75%	**$563**
Jose	$1,000	$1,500	Cultivation	40%	**$600**
Hsiao-Wen	$100	$250	Identification	10%	**$25**
TOTAL	**$1,600**	**$2,500**			**$1,188**

With iWave

Donor	5-Year Capacity	iWave Score*	Realization Rate	5-Year Potential	Annual Potential	Pipeline Stage	Probability	Pipeline Forecast
Margaret	$1,000,000	4	25%	$250,000	$50,000	Solicitation	75%	$37,500
Jose	$500,000	3	15%	$75,000	$18,750	Cultivation	40%	$7,500
Hsiao-Wen	$250,000	2	5%	$12,500	$2,500	Identification	10%	$250
TOTAL	**$1,750,000**			**$152,500**	**$30,500**			**$45,250**

BUILD DIRECTION

How to Align Boards, Executives and Fundraising Teams Around One Roadmap

Why Roadmaps Fail

In a Bridgespan survey of 120 nonprofits, staff rated their organizations' ability to implement strategy lower than other organizational capabilities.

PRIORITY	**Priorities remain too high-level** Strategy remains at the level of goals instead of becoming specific initiatives and decisions.
SEQUENCE	**Activity is not translated into an executable sequence** Teams do not know what happens first, next or later.
CAPACITY	**Resources do not follow priorities** Staffing, systems and leadership attention remain unchanged.
REVENUE	**Progress and assumptions are not actively updated** Forecasts become disconnected from actual progress.

The Culture of Philanthropy

A strong organizational "culture of philanthropy" exists when fostering philanthropy is everyone's responsibility from the board of directors to the CEO to program staff, and not the sole duty of fundraising.

BOARD:
Govern, Connect, Champion

FINANCE & OPERATIONS:
Support, Integrate, Sustain

LEADERSHIP:
Prioritize, Resource, Enable

PROGRAM DELIVERY:
Deliver, Impact, Document

FUNDRAISING:
Analyze, Cultivate, Execute

One Roadmap Connects the Decisions

What should the shared roadmap actually be built from?

PRIORITY

Apply the opportunity-readiness matrix

- Prioritize now
- Build readiness
- Test the market
- Defer

SEQUENCE

Apply readiness and moves management

- Current Stage
- Next Move
- Timing

CAPACITY

Test execution requirements

- Relationship coverage
- Staff and systems
- Leadership involvement

REVENUE

Separate expected from potential

- Near-term expected revenue
- Longer-term opportunity

Major Giving Growth Example

Bridging Shared Evidence to Shared Decisions

What do we know?

PRIORITY	SEQUENCE	CAPACITY	REVENUE
✓ 28 donors have strong capacity, affinity, and propensity ✓ 20 are qualified or near-qualified	✓ Some donors are ready for solicitation ✓ Each priority donor needs a defined next move	✓ 11 of the 28 have active relationship coverage ✓ Portfolio capacity is uneven	✓ Longer-term potential: **$500K** ✓ Near-term expected revenue: **$200K**

What will we do?

PRIORITY	SEQUENCE	CAPACITY	REVENUE
✓ Focus on the 20 qualified or near-qualified prospects	✓ Define a next move and target timing for each	✓ Assign relationship coverage and leadership support across the portfolio	✓ Plan for $200K near term; retain $500K as longer-term potential

A Team Effort

Targeting 20 prospects with a $200K near-term goal requires different roles and responsibilities

BOARD

Open doors to the 20 priority prospects and join selected cultivation or solicitation conversations.

FINANCE & OPERATIONS

Validate the $200K near-term forecast, support CRM tracking, and monitor whether current capacity can support the $500K longer-term opportunity.

LEADERSHIP

Commit time to the highest-value relationships and resolve portfolio or staffing constraints.

PROGRAM DELIVERY

Provide impact stories and engagement opportunities that help deepen affinity with priority donors.

FUNDRAISING

Own the 20 priority prospects, assign next moves, and advance donors through qualification, cultivation, and solicitation.

Keep the Roadmap Alive

Enable strong governance and discipline

MONTHLY: Manage	Review the 20 priority prospects
	Confirm next moves and relationship owners
	Resolve stalled cultivation or capacity issues
QUARTERLY: Reforecast	Compare the $200K expected revenue to actual pipeline movement
	Reassess readiness and ask timing
	Adjust resource or leadership involvement
ANNUALLY: Recalibrate	Re-screen or reprioritize the prospect pool
	Revisit the $500K longer-term potential
	Reset goals based on results, capacity, and new opportunities

PARTICIPANT POLLING QUESTION

Where do you see the most room for improvement in your organization?

A. Cultivating and sustaining donor relationships
B. Fundraising strategy, audience segmentation, and engagement
C. Communication and alignment between teams
D. Process and technology resources
E. Data standardization and intelligence tools

SEPTEMBER 23, 2026 | 10:00 A.M. PT / 12:00 P.M. CT

Build Capacity: *The Systems and Teams Behind Sustainable Growth*

What to Expect:

- Warning signs that operations are limiting fundraising performance
- Technology alignment when CRM/ERP is the issue vs. configuration vs. process
- Why workflow clarity improves donor experience and staff retention

Questions?

Thank you for attending

Additional questions?

Reach out to us at experts@armanino.com

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