



Development with Purpose:

Harnessing the Power of Intentionality

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*"Fundraising is the gentle art of teaching
the joy of giving."*

- Hank Ross

Today's Agenda

Why Intentionality
Matters

Shifting the
Fundraising
Mindset

Best Practices for
Purpose-Driven
Fundraising

Cura Personalis:
Personalized Donor
Engagement

Leveraging Your
Board

Avoiding Common
Pitfalls




Part I: Why Intentionality Matters

Aligning Strategy with Core Values and Mission

Intentionality Matters

The Jesuit Ethos of
Purposeful Action

Every Second Counts



WHY we do what
we do?

HOW we do what
we do?

WHAT are we trying
to accomplish?

**“If you’re proactive, you focus
on preparing.
If you’re reactive, you end up
focusing on repairing.”**

John C. Maxwell
Author, Speaker and Leadership
Expert

Benefits of Raising Money with Intentionality

A few benefits of being intentional in your development strategy and practice:

- ◆ **Clearer Goals**
- ◆ **Targeted Outreach**
- ◆ **Stronger Relationships**
- ◆ **Increased Engagement**
- ◆ **Better Storytelling**

REMEMBER:

Purposeful action drives sustainable results.

Anchor to the Why

Telling Your Story With
Mission-First Fundraising
is Compelling & Enduring

INTENTIONALLY CRAFTING YOUR STORY

Story of Place

- What is the need that we address?
- Why is it important that our school exists?
- What do we do that is completely different or special?
- What is our value-add?

Story of Self

- What is your personal connection to your school?
- What brought you to champion this work?
- Why do you choose to continue working here?

Story of Us

- How can YOU be part of the narrative here?
- Why is now the time to invest in what we are doing?
- What are all of possibilities for collaboration?

Know your Audience

Strategy: Storytelling

Tools: Qualitative anecdotes, programmatic narratives, personal stories, etc.



Strategy: Statistics

Tools: Quantitative success, measurable outcomes, long-term impact, etc.

Building Your Toolkit

STORYTELLING

Tools: Qualitative anecdotes, programmatic narratives, personal stories, etc.

Questions to Consider:

Why are you sharing these specific anecdotes?

Do you have qualitative stories that touch each of the programmatic areas or populations served?

What is at the heart of these narratives?

What are you trying to communicate to donors?
How do you want them to feel?

What is the goal of this conversation?

STATISTICS

Tools: Quantitative impact, Measurable outcomes, projections of long-term impact, etc.

Questions to Consider:

How do you use statistics effectively?

What story do you want to tell?

Are these statistics easily digestible or do they require a deeper knowledge base?

What is your process for updating these regularly?

What is the goal of this conversation?

Part II: Mindset Over Mechanics

Shifting the Fundraising Mindset



Move From Transactional to Transformational

FUNDRAISING

- Transactional
- Focus on Revenue
- Focus on Income Generation
- Short-term Strategy



DEVELOPMENT

- Relational
- Prioritizes Cultivation
- Prioritizes Stewardship
- Long-term Strategy

Donors as Stewards & Partners

Shared Vision =
Deeper Engagement

Why Donors Give

Understand WHY different types of donors give, to engage them as stewards and stakeholders, not just dollars.



Foundation Funders

- ✓ Align with their corporate foundation or business objectives
- ✓ Provide a vehicle to engage employees in service to others
- ✓ Highlight brand awareness



Corporate Partners

- ✓ Follow guidelines and have an attention to detail
- ✓ Have clearly defined metrics and program evaluation
- ✓ Align with their stated giving priorities and funding areas



Individual Donors

- ✓ Align with their personal philanthropic interests
- ✓ Explain the need and how they can be a part of the solution
- ✓ Make a tailored case for support, connecting interests to mission

Finding Your Donors

The ABCs of Philanthropy

- **Ability** to give
- **Belief** in your cause, or similar causes
- **Connection** to someone in your organization

If an individual does not have all three of the ABC's, they are not a viable prospect.

Hope is Not a Strategy

Searching for transformational donors without a clear thread is not an effective way to meet annual revenue goals.

Donor-Centric Conversations

Use integrated strategies to tailor your storytelling to the individual.

What motivates this donor? How do they communicate? What kind of information do they need or want?

STRATEGY: NARRATIVES & STORIES

Qualitative Anecdotes

Programmatic Narratives

Personal Stories

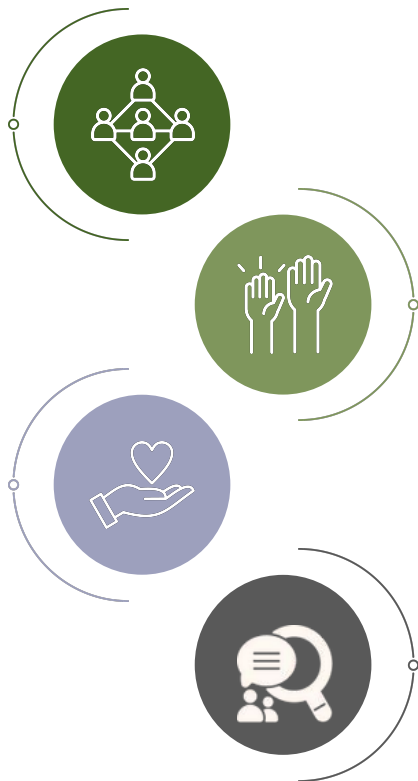
STRATEGY: DATA & STATISTICS

Quantitative Successes

Measurable Outcomes

Long-Term Impacts

Harvest Essential Questions



CONNECTIONS TO US

How are do they know about us? What about our work inspires their giving?

DONOR INTERESTS

How do they like to get involved? Are they volunteer or serve with other organizations?

PHILANTHROPIC MOTIVATIONS

Why are they considering a gift to us? What programs are they passionate about?

HOW THEY GIVE

When do they usually give and how do they decide?
What amount or range are they considering?

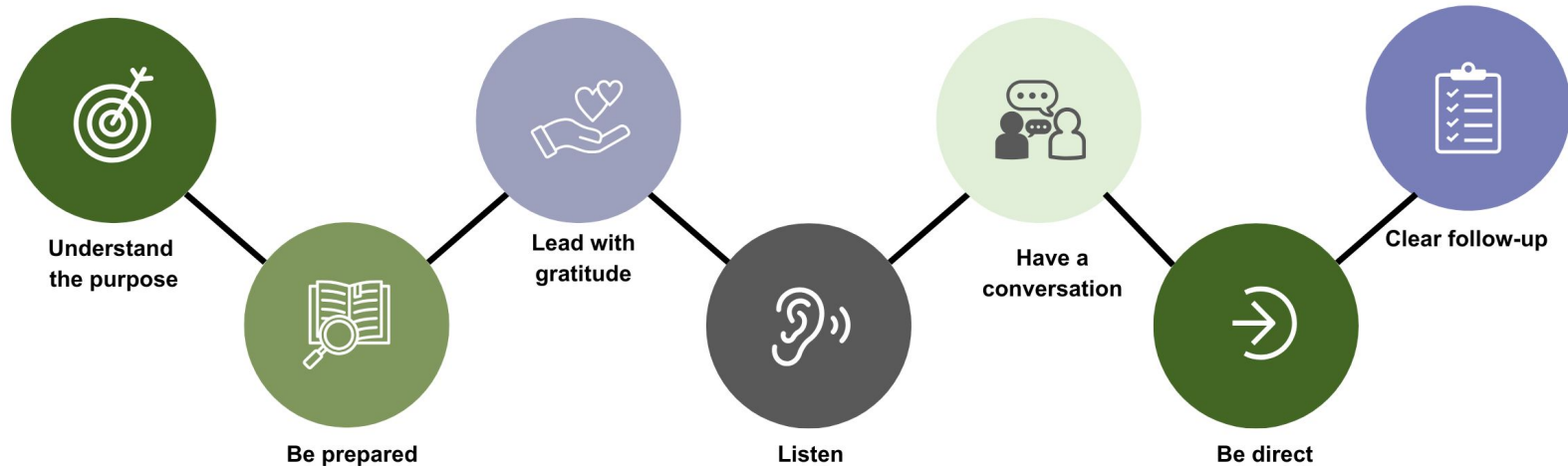
Cura Personalis: **A Personalized** **Approach**

Engagement should be tailored to who donors are as people, not just what they can give

What Individual Donors Want to Understand

- What is the NEED you're trying to address
 - How do you ADDRESS the need
 - How can THEY be part of the solution

KEYS TO SUCCESS



Share Opportunities to Engage



**Serve in a
Leadership
Position**

**Deepen
Knowledge of
Impact**

**Make a
Personally
Meaningful
gift**

**Join a Donor
Community**

To best understand what Donors are interested in, we need to present all opportunities available and let THEM decide how to engage with us.



Part III: Best Practices for Success

How to Propel Purpose-Driven Fundraising

The Donor Lifecycle

Moves Management is the term used for the systematic way we qualify and grow our relationships. As the relationship evolves, our touch points continue to be tailored to their individual needs.

DISCOVER

Identify and qualify prospective donors.

CULTIVATE

Build a relationship. Learn interests, motivations, capacity, and inclination.

BRIEF

Share all funding opportunities available for partnership.

SOLICIT

Make a specific, targeted ask.

STEWARD

Express gratitude sincerely and repeatedly. Provide opportunities to further engage.



Changing Your Pitch for Your Audience

THE NEW CARD

“I’ve taken a new role and I’d like to hear your perspective”

ISSUE UPDATE

“I’d like to share a timely update that you’ve made possible”

TIMELY OFFER

“I’d like to share a special opportunity” (match funding, new opportunity)

MEDIA HIGHLIGHT

“You may have seen this in the news... I’d love to share how we are responding”

COMMS PREFERENCE

“I want to share relevant information with you. How do you want to hear from us?”

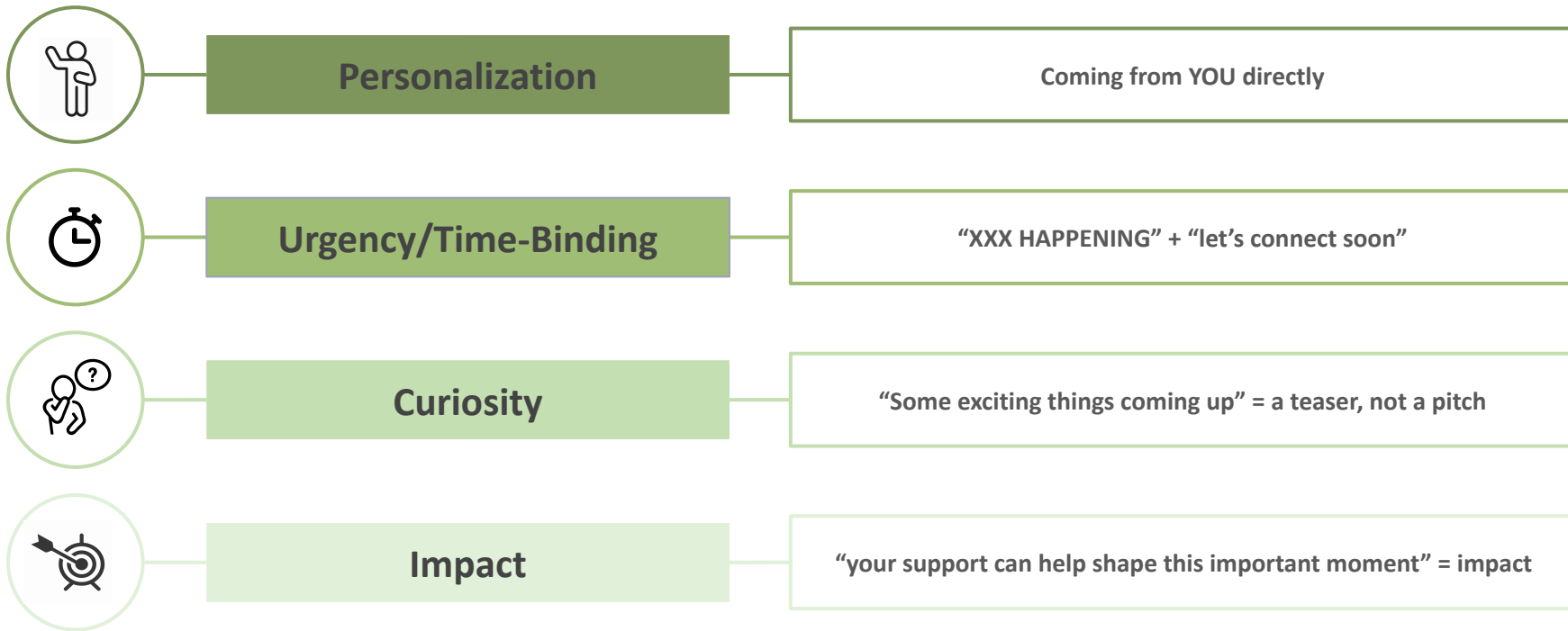
LEADERSHIP CONNECT

“Our XX would love to hear your perspective on...”

The 4 Building Blocks of Successful Outreach

ALL YOU NEED IS ONE SIMPLE SENTENCE:

"With XXX HAPPENING, I'd love to connect soon and share a few ideas on how your support could help shape this historic moment."



The Unholy Trinity

GHOSTING

When a prospect completely stops responding after initial contact — no replies, no explanations.

GATEKEEPING

When an Executive Assistant or Administrator screens or blocks your access to the decision-maker.

SLOW REPLIES

When a prospect says they're interested but then takes a long time to respond or move forward.

Preparing for Effective Donor Meetings

KEY QUESTIONS TO CONSIDER before any type of donor meeting...



1. Goal of the Meeting



2. Timing & Sequencing



3. Materials to Prepare



4. Top Speaking Points



5. Suggested Follow-Up

MAKING THE ASK WITH CONFIDENCE

KEYS TO SUCCESS

- Don't make decisions for the donor
- Lay out all of the opportunities for engagement and let them respond
- Do your homework: Come prepared with a researched and direct ask
- Count to ten following an ask; wait for the donor to respond
- Utilize the phrase "Would you consider..."
- When in doubt, just ask; we can't decide for them and we shouldn't

THE SOLICITATION MINDSET

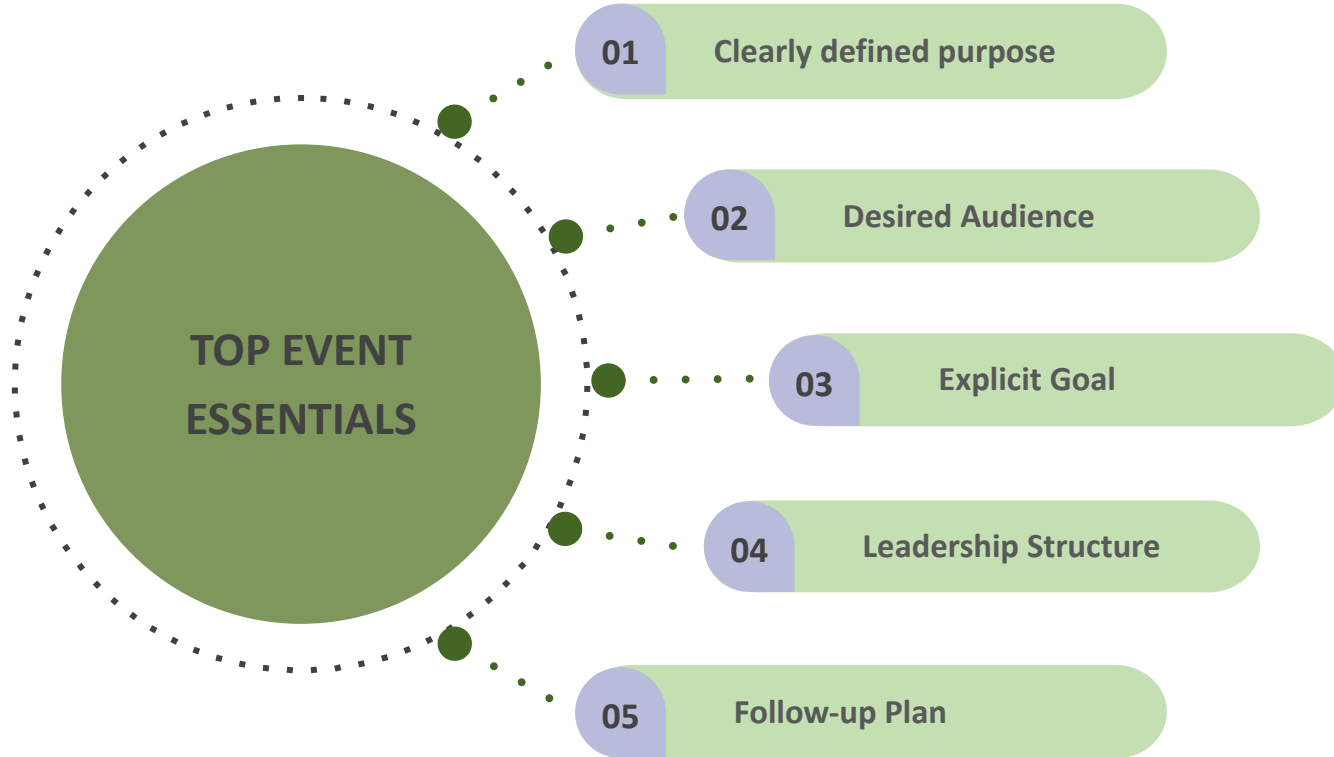
- Know your boundaries
- Be authentic, be yourself
- Keep your sense of humor
- Walk towards the barking dog
- Remember, don't ask, don't get!
- Be proud of the work you're doing; sharing it is a privilege

Why Have Special Events?

Planning intentional donor events provides you with the tools to...

- ◆ **Build a major gift pipeline**
- ◆ **Share a clear, consistent message**
- ◆ **Raise unrestricted funding**
- ◆ **Provide a leadership opportunity for stakeholders**
- ◆ **Express gratitude and appreciation**

Designing Intentional Development Events



Leveraging Your Board

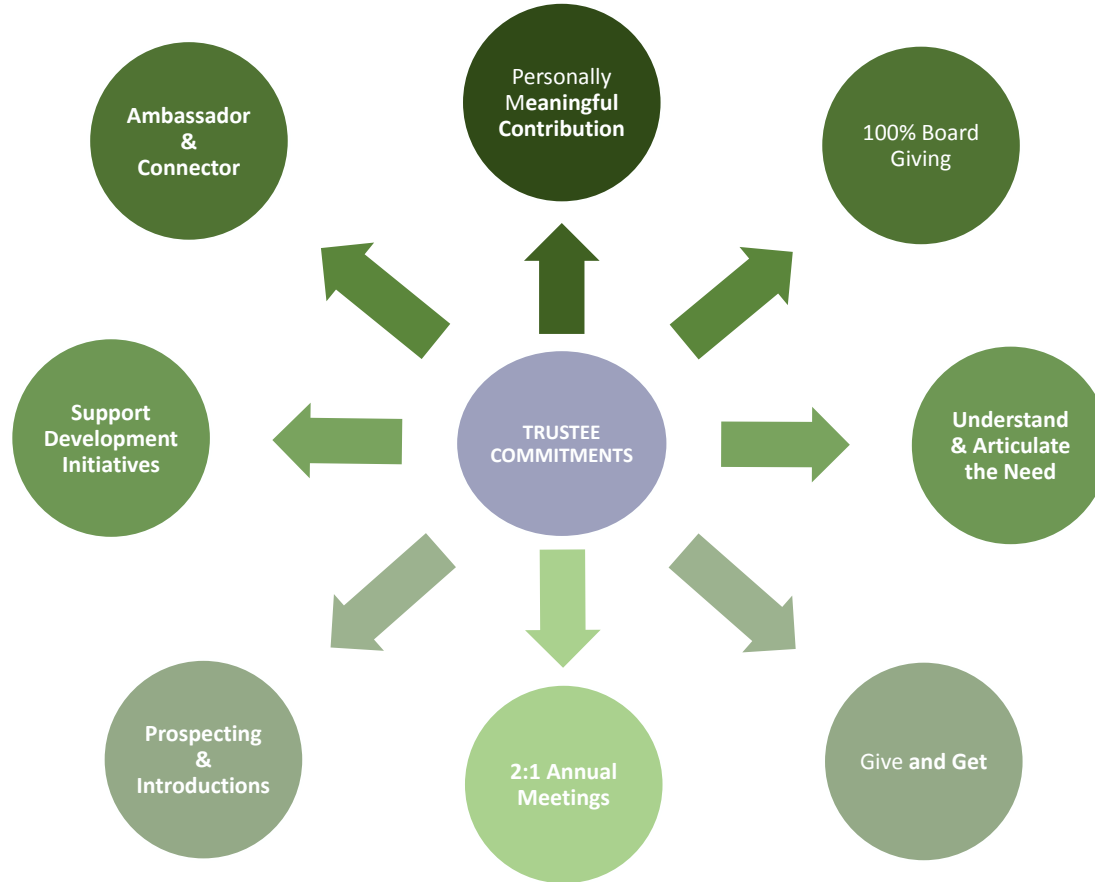
Setting Expectations &
Driving Accountability
With Intention Works

Providing Resources for the Organization

All Board Members and Trustees serve the mission.



Trustee Responsibilities: Advancement



Key Strategy:

TRUSTEES ANNUAL ENGAGEMENT MEETING

*A high-impact governance practice proven to
reinforce commitment, strengthen relationships
and increase accountability.*



Board Engagement Review Meetings Basics

Who Participates:

- President/Chancellor
- Board Chair or Advancement/Development Chair
- *Sometimes VP for Advancement will join*

Format Options:

- **Smaller Boards/Or Heavy Fundraising Focus:**
 - Held annually with every Trustee
- **Larger Boards (30+ members):** Handle based on Trustee Tier
 - **Tier 1:** Annual 2:1 meetings for active leaders/major donors
 - **Tier 2:** Meetings every 2–3 years or led by committee chairs
 - Others trustees supported through staff-driven stewardship

Purpose of Meeting

- Say thank you
- Reflect candidly on board experience
- Gather feedback
- Explore their interests and strengths
- Reconfirm “give/get” commitments
- Review Personal Engagement Report

Part IV: Leveling Up

Successful Habits Of Fundraising Rockstars



Silo Mentality Undermines Success



RISKS OF SILOED TEAMS

- Reduced collaboration
- Duplication of work
- Slower decision making
- “Us vs. Them” mentality
- Poor donor service
- Communication breakdowns
- Leadership Discord
- Unclear Priorities
- Lack of accountability
- Delays and missed deadlines
- Mistrust and rivalry
- Decreased staff morale

Joint Communication-Development Calendar

Different departments **MUST** coordinate donor contact.

→ **WHEN** are you reaching out?

→ **HOW** are you reaching out?

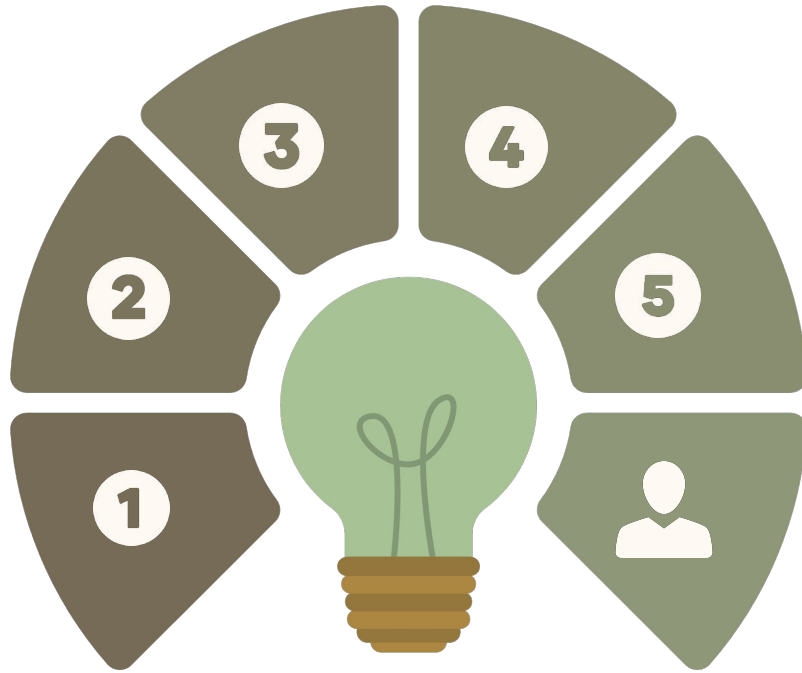
→ **WHY** are you reaching out?

After you map out these answers, you can create intentional rules about how often and in what way you will reach out.

KEY ITEMS TO CHECK:

- ☐ Foundation deadlines
- ☐ Special Events
- ☐ Programmatic Calendar
- ☐ Fundraising Appeals
- ☐ Holiday Outreach

Magic Happens When Teams...



- 1 Trust and Empower Each Other
- 2 Prioritize Transparency
- 3 Follow-through and Follow-up
- 4 Share Information
- 5 Celebrate Each Other Regularly

"Go forth and set the world on fire."
- St. Ignatius

Thank You!

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