

INSIGHTS
REPORT

A photograph of three people sitting on a light-colored sofa in a modern, wood-paneled room. A woman on the left in a white short-sleeved shirt and tan pants holds a blue tablet. A woman in the middle in a light blue button-down shirt and blue pants is gesturing with her hands while speaking. A man on the right in a white long-sleeved shirt and light grey pants is listening. A large green plant is visible in the upper right corner. A black coffee table is in front of them.

Keeping Major Donors Close in Trying Times

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The Chronicle of
Philanthropy

Lead Your Nonprofit with Data

Track what matters, lead with insight, and grow with confidence

Download the e-book

Advanced fundraising metrics

- **Major gift pipeline velocity** – Measure how quickly prospects move through the donor engagement cycle and make a contribution
- **Planned and legacy giving metrics** – Track pipeline health for legacy gifts
- **Endowment yield performance** – Assess investment sustainability
- **Capital campaign pyramid tracking** – Monitor momentum across gift levels
- **Corporate partnership ROI** – Evaluate revenue and mission alignment



Part 2: Data governance and trust

As a current or future executive, you're also the steward of your organization's data privacy and integrity. With rising donor expectations and evolving regulations, nonprofits of all sizes need a clear approach to managing data responsibly.

Start by implementing core governance practices that build trust and ensure consistency across your systems.

Key practices to implement now:

- **Establish data retention and deletion protocols** – Clarify how long to keep records and when to safely remove outdated information.
- **Define user roles and access levels across departments** – Limit access to sensitive data based on staff responsibilities.
- **Adopt a donor privacy policy and include it in your online donation forms** – Show donors that their information is being handled responsibly.
- **Keep up with legal standards for data protection** – Ensure compliance with regulations like the General Data Protection Regulation (GDPR), the California Consumer Privacy Act (CCPA), or your country, state, or provincial equivalents.

Nonprofit CRM tools like user access controls (to limit who can view or edit sensitive data), activity tracking (to monitor changes and prevent errors), and address validation (to keep contact info accurate) help ensure your records stay clean, secure, and compliant throughout the year.

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Whether you're a development director advocating for a new investment or an executive director seeking board buy-in, data is your strongest ally. Use performance dashboards, donor trends, and ROI reports to present evidence, anticipate questions, and build confidence with your leadership team, executive director, or board of directors. Managing up isn't about reporting more—it's about sharing the right insights at the right time to inform smart decisions and move your mission forward.

Part 3: Building a system for nonprofit growth

Your fundraising tools should empower your team, not overwhelm them. A strong system combines the right software with *seamless integrations*, so your data flows automatically between platforms like your CRM, marketing tools, accounting software, and event systems.

Core tools in a connected fundraising system:

- **Nonprofit CRM** – Your central hub for donor data, tracking, communicating, and reporting
- **Marketing automation** – Send personalized emails and donor journeys automatically
- **Event and volunteer management** – Capture engagement and convert participation into giving
- **Finance/accounting tools** – Sync gift data with Intuit QuickBooks Online, Sage Intacct Accounting, or other systems
- **Custom reporting and dashboards** – Visualize performance and track key metrics

When your fundraising tools talk to each other, you save time on manual tasks, reduce errors, and make smarter

decisions faster.

PRO TIP: Use Application Programming Interfaces (APIs) to sync real-time dashboards, trigger stewardship journeys, or pipe data into finance forecasting tools.

INTEGRATION INSIGHT: DonorPerfect's open API and built-in integrations make it easy to connect your nonprofit CRM to finance tools like QuickBooks, email platforms like Constant Contact, or custom dashboards for board reporting. Automating these data flows can save hours each week—and ensure everyone's working from the same up-to-date information.



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Donors who make big gifts to charity tend to be motivated by mission but also by trust in the nonprofit they're supporting. Major gift officers are at the forefront of building that trust, and the relationships they steward can lead to transformative gifts.

The data back up this premise. Of the donors on *Chronicle's* annual [Philanthropy 50](#) list of the nation's top givers, more than two-thirds had longstanding ties with the nonprofits to which they gave the most in 2025. No fewer than 35 of the major donors on the list gave to charities that they have supported for five to 10 years — some for even longer.

To maintain long-term relationships, fundraisers must steward major donors through regular updates, transparent communication, and deep listening. That's no simple task today, when so many nonprofits are finding themselves on one side or another of political debates.

"Donors are more open with their preferences and opinions than they've ever been before," says Kathryn Van Sickle, director of Yale University's Parents Leadership Council, a giving society for parents of enrolled students who contribute at least \$25,000 to the Parents Annual Fund each year.



Two-thirds of the nation's top givers on the Philanthropy 50 list have longstanding ties with the nonprofits they supported most in 2025.



In donor conversations today, Van Sickle says she needs to be ready to represent the school's policies on various issues, converse knowledgeably on developing news events, and defend the value of higher education as a whole — rather than just promoting her institution.

Van Sickle is far from the only fundraiser who is fine-tuning her stewardship strategies. The *Chronicle* spoke with 10 major gift officers and consultants to learn which tactics are working now.

Across the country several key trends emerged. For example, fundraisers are embracing their roles as trusted explainers, demystifying policy shifts such as new tax legislation and federal Medicaid cuts. And they're creating community by planning special convenings and experiences where donors can come together. They're also honing skills such as deep listening and sticking to the basics of fundraising: the care and feeding of strong relationships. These efforts and more can make the fundraiser-donor relationship a source of stability during this tumultuous time.

When speaking with donors, fundraisers should emphasize the nonprofit's stability, long-term goals, and commitment to essential solutions at a time when many donors feel powerless. Above all, don't feel pressured to match a donor's outrage or despair, counsels Nicole Engdahl, vice president of individual giving at the African Wildlife Foundation. "Your tone is your tactic," she says. A key question to consider during donor conversations, Engdahl says, is, "How can you be the adult in the room?"



Be Ready to Explain Complex Changes and Serve as a Trusted Source of Information

For the last 37 years, Faith Sandler has been executive director of the Scholarship Foundation of St. Louis, a legacy nonprofit offering college financial aid to talented St. Louis-area students. She raises money to fund 26 scholarships and an interest-free loan program that sends around 500 students to college each year — often by providing the last dollars needed to cover their tuition and living expenses.

Many of the foundation's major donors — those who give \$100,000 or more — are longtime supporters. Broadly speaking, their support is stable and not subject to the kind of disruption and disputes that some nonprofits — especially higher-education institutions — experienced after the war in Gaza began in 2023.

“Where we have seen some change is mostly in major donors’ needs for us to help interpret the current moment for them,” Sandler says.

For example, when the U.S. Supreme Court handed down its 2023 decision in *Students for Fair Admissions v. Harvard*, which ended affirmative action practices in college admissions, news stories reported panic at colleges where administrators were rushing to overhaul their admissions processes. Donors were confused not only by the policy changes but also by the coverage of what the ruling meant.

“There are headlines constantly that don’t totally jibe with the story that follows, let alone the actual fact,” Sandler says. “For that reason, we’re a sort of moderator.”

Sandler and her team worked proactively to calm donors, emphasizing the foundation’s long-term commitment to supporting students and offering informed insights into the judicial ruling.

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In communications with donors, the foundation focused on its stability, explaining to supporters that despite the changes going on in the world, the foundation was holding steady. Simply put, Sandler says, the message was: “We’re good.”

She and her colleagues offered analysis of the Supreme Court’s decision and how colleges and universities were responding to it. And they underscored why the Scholarship Foundation of St. Louis remained a good investment, regardless of changes to admissions policies.

The goal, Sandler says, was to emphasize to donors that they were in good hands.

With news developing at a punishing clip, fundraisers often find themselves in the role of explainer. It’s a good sign that donors trust them as an accurate source of information, but it requires new levels of preparation from fundraisers.

Van Sickle, at Yale, says fundraisers used to avoid conversations with donors about hot-button issues like politics or religion. But those topics have become inescapable in recent years. So many donors, she says, want to discuss the news with her — and understand the university’s stance on various issues.

“That has been a big challenge,” Van Sickle says. “There was a point where I was like, I can’t keep up with the news fast enough to respond — which, I’ve never felt that way [before].”

At Yale, quarterly invitation-only webinars featuring presentations by deans and other university leaders are an important source of information for donors, volunteers, and staff. Van Sickle often tunes in to gain insights into how leaders are communicating about key issues such as trust in higher education and the increased tax on college and university [endowment income](#). She often shares direct quotes from these events with donors to help explain the university’s policies and positions.

But smaller teams face an even greater challenge when it comes to explaining news developments. Whitney Phillippi is chief advancement officer at Northern Rivers Family of Services, a human services organization

“You need to know this stuff,” Phillippi says. “It’s intimidating, but it can really make all the difference in your whole program.”

that partners with more than 60 programs for children and adults in New York state. As one of just three fundraisers, she has had to quickly grasp how the tax legislation passed in July 2025 will change incentives for her donors in the 2026 tax year and beyond.

“You need to know this stuff,” she says. “It’s intimidating, but it can really make all the difference in your whole program.”

One tool that can help: artificial intelligence. A chatbot query as simple as, “Hey, can you explain this to me like I’m a sixth grader?” can help fundraisers get their arms around what’s changed and why that matters, Phillippi says.



Offer Connections and Experiences Donors Can't Get Anywhere Else

Despite the fractured nature of the information and political landscape — or perhaps because of it — fundraisers say major donors are jumping at the chance to come together for special events and experiences.

“The first couple years after the pandemic, it almost felt like it didn’t matter what we did, people were just so happy to be together,” says Van Sickle, at Yale. “But now they’re like, ‘We want more.’”

At Yale, Van Sickle has noticed that major donors increasingly want face time with university leaders. She must balance that hunger with the busy schedules of the university’s deans and president. One strategy: asking deans to share their travel schedules with the advancement office so that fundraisers can arrange meetings for them with donors who live in the regions they visit.

Major donors increasingly want face time with leaders.

As a fundraiser who raises money from parents of current students, Van Sickle stewards major donors on a more compressed timeline than she would if she were seeking gifts from alumni. To that end, these meetings with leaders — whether on campus or in a donor’s hometown — can make a big impact on her fundraising totals.

“Any opportunity we have to put forward various deans, [or the] president with our donors — that is such a virtuous cycle with stewarding the last gift and then queuing up the next gift,” Van Sickle says.

What’s more, fundraisers say the usual strategies of donor breakfasts and galas are no longer cutting it.

“Our major donors are becoming even more interested in truly unique experiences,” says Ryan Merkel, senior director of development at the Shakespeare Theatre Company in Washington, D.C.

Instead of inviting donors to events like an intimate dinner party, the theater is now creating opportunities for a major donor to have personal interactions with a member of the theater's creative staff, such as an actor, director, or designer. For example, major donors were invited to join the theater's prop director to learn the secrets behind using fake blood on stage. "Those kinds of things are really appealing to people," Merkel says. [Travel opportunities](#) are another huge draw for major donors.

Donors who contribute at least \$25,000 to the Shakespeare Theatre Company receive first access to join other major donors on a weeklong trip to see new theater productions in London. If spots are still available, the theater will invite donors in the \$15,000 giving society, then \$10,000, and so on, until the trip is full.

The theater launched its travel program in 2023. "It has just exploded in the last year in such a great way," Merkel says.

Seventy donors signed up to join the November 2025 trip, so the theater opted to run two back-to-back trips and keep the group size intimate for each one. While in London, donors get tickets to some of the hottest shows playing in the West End and have the opportunity to join informal conversations with members of the Shakespeare Theatre Company's artistic staff to discuss the performances and dig into their dramaturgical choices. Participants also are invited into intimate conversations with directors or actors in some of the shows they see. In these sessions, they can ask questions about the production and gain insight into their creative processes.

"We want to create an experience that is far beyond what you could get yourself if you just went to London and bought a bunch of tickets — even if you paid a lot of money for them," Merkel says.

The theater company works with a travel agency to organize the trip, but staff members also handle a lot of coordination and communication work, Merkel says. The investment is worth it, however, because the trips are a strong source of revenue.

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The trips are dedicated entirely to stewarding existing donors and cultivating sustained giving. Participants are never asked to make a gift during their time in London. “We made a conscious effort not to do that,” Merkel says.

The strategy works. Donors who travel to London with the theater often increase their gift without prompting when they return home, Merkel says, or else they may add the theater to their estate plans or introduce Merkel to a grant officer at their employer’s corporate foundation. In just three years, the trip itself has become a hot ticket. “We have people that are calling us up and saying, ‘What level do I need to give at to be invited on this? How much do I have to increase?’” Merkel says.



Practice “Athletic Listening”

In recent years, political polarization and hot-button issues have challenged fundraisers' abilities to nurture long-term ties with their biggest donors.

In 2023 and 2024, for example, some colleges and universities [endured tumult](#) as a handful of vociferous major donors pulled their support of institutions, such as Harvard University and the University of Pennsylvania, over their response to the war in Gaza. And while those donor revolts ultimately [did not spread](#) as widely as some fundraisers had feared, they were a difficult test for the sector.

Sandler, at the Scholarship Foundation of St. Louis, says she's recently noticed "less than a handful" of her major donors making assertive requests of her organization. And while these donors are in the minority, their inquiries have left Sandler, a veteran fundraiser, taken aback.

"There's something about the current climate of the last year which has changed the boldness of the request or the demand from the donor," Sandler says.

One major donor, for example, wanted to award more named scholarships but fund each one at a lower amount per student — a strategy that runs counter to the Scholarship Foundation of St. Louis's mission to provide crucial final dollars so high-achieving students can attend college with little or no debt. Lower-value scholarships could mean recipients would likely still be short on funds after receiving the foundation's support.

"We have to be principled and say, 'Thank you, but no thank you. That is not consistent with who we are, nor the relationship we've developed thus far,'" Sandler says.

In this instance, Sandler reiterated the foundation's approach to the donor, underscoring its commitment to fully plugging financial gaps for students, and sharing data on the impact of this strategy. She also asked

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the donor to consider funding fewer scholarships at the usual value, as a way to give less while still providing students with meaningful support.

Some donors today, Sandler says, can behave as if everything is negotiable — when that is not the case.

And when major donors try to make changes that don't align with the nonprofit's mission or values, fundraisers need to be comfortable letting that donor go, Sandler says. The major donor who wanted to fund more scholarships at a lower amount per student, for example, was not swayed by Sandler's explanations about the importance of meeting students' remaining financial needs and has paused their support for now.

“Try to tug on heartstrings and shift the focus away from the polarization.”

Such conversations are not easy, but when major donors have critical feedback for a nonprofit or alternative ideas for its strategy or leadership, fundraisers need to hear them out, says Carla Willis, managing principal at Washburn McGoldrick, a fundraising consulting firm.

In recent years, Willis says, her firm has had to coach more of its clients in the art of managing difficult conversations with donors. She recommends that fundraisers begin by deploying “athletic listening,” paying careful attention to what a donor is saying and why they're saying for it.

“But then, remind the donor of why they started being philanthropic to the institution in the first place,” she says. “Try to tug on heartstrings and shift the focus away from the polarization.”

Those reminiscences can help get the conversation back within the bounds of shared values and out of the realm of disagreement. But in some cases, fundraisers will be unable to breach the divide with a donor.

When that happens, Willis says, it's best to move on from that donor. But it doesn't have to be a clean break. In the past, Willis says, she has asked donors who have paused their support if she could periodically update them about events happening at the nonprofit.

“If you do that and if a donor takes your call or responds to your email or your text — that to me is an indicator that there's still passion there,” Willis says. “Because they're choosing to take the time to respond.”



Adhere to the Basics: Focus on Building a Strong Relationship

Although fundraisers may be encountering some new topics of conversation with donors, fundraising experts say that the first principles of donor stewardship remain paramount. Prompt expressions of gratitude, regular communication, and personalized relationships all matter more than ever.

These strategies are best practices because they work, says Ali Colbran, senior director of development at Feeding San Diego.

Simply by thanking a major donor for her gift and updating her on its impact, Colbran inspired a major donor to follow a first-time \$40,000 gift to meet urgent, pandemic-related needs in 2020 with another \$50,000 gift later that year. Colbran's stewardship fostered an effective, multiyear partnership. In 2021, when the donor wanted to give again, she agreed to contribute \$600,000 to fund Colbran's gift proposal for large-scale food distributions. She continued to give \$100,000 annually for the next three years.

All told, the donor contributed nearly \$1 million — \$990,000 — from 2020 to 2025. The donor told Colbran that Feeding San Diego was the only food bank out of about 10 she supported in 2020 to personally thank her for her initial gift.

In addition to expressions of gratitude, in-person meetings also remain important. "Zoom is still considered a last resort," says Van Sickle, at Yale.

All gifts of \$250,000 or more raised by Yale's Parent Leadership Council involved an in-person visit by a fundraiser to the donor's hometown; a visit to the university for an on-campus meeting or event; and a meeting with a university leader. "That's so old school, but that is the trifecta," Van Sickle says.

Frequent, informal communication with donors is also essential, fundrais-

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ers say. When lines of communication are open, Willis says, donors can include fundraisers in their thinking about certain issues. This thought-partnership helps prevent dustups that could end with a donor walking away.

What's more, Sandler says frequent check-ins help donors feel that their support really matters. This, of course, is the goal of an annual report, but Sandler says informal notes can sometimes do an even more effective job of demonstrating impact. She often writes emails to donors with updates about students she meets and makes connections between scholarship recipients and major donors' interests or backgrounds.

Sandler never asks for support in these notes; she focuses instead on establishing personal connections. In her outreach, Sandler says she wants to impress upon donors that their support matters at a time when there may be many causes for despair. "When you wake up at three in the morning and have that 'Oh my God, what can I do?' [thought]," Sandler will tell a donor, "I want you to know you're already doing it."

Frequent check-ins help donors feel that their support really matters.

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