# KAYLA MOORE

Annual Giving • Fundraising Communications • Donor Strategy • Data

SELECTED PROFESSIONAL WORK

*I use data to understand people, and writing to move people.*

Prepared for People's Resource Center • Annual Giving Manager interview

**WRITING • DATA • STRATEGY • STEWARDSHIP**

PRIVATE PROFESSIONAL PORTFOLIO

# How I Approach Annual Giving

LISTEN is the working lens I use to connect donor behavior, writing, asking and stewardship.

I start with the data to notice patterns, then use conversation and writing to decide what invitation makes sense next.

### L • LEARN

Use giving history, recency, frequency and engagement to see where the relationship may be changing.

### I • IDENTIFY

Learn what the donor cares about, how they have engaged and what they need to understand.

### S • SURFACE

Name likely hesitation directly so the message answers the question the reader may already have.

### T • TRANSLATE

Make the mission clear without reducing people to their hardest moment.

### E • EXTEND

Make a clear, appropriately ambitious invitation grounded in history and relationship context.

### N • NEXT STEP

Acknowledge, document, steward and decide what the relationship needs next.

*Influenced by Chris Voss's listening-centered negotiation principles and Sherry Quam Taylor's 'best gift' fundraising philosophy; adapted through my experience in community-centered annual giving.*

**PERSPECTIVE I BRING**

My perspective was shaped in community-based work long before I had a fundraising title. I learned to start with what people and communities already carry — relationships, knowledge, resilience and possibility — and build from there.

*COMMUNITY IS AN ASSET.*

**Bilingual English / Spanish • Community-based development • Direct-service + higher-education experience**

*LISTEN is Kayla Moore's application of acknowledged influences and professional experience; it is not presented as a proprietary Chris Voss or Sherry Quam Taylor framework.*

# Portfolio Map

Actual work first. Short interpretation second.

**DATA → INSIGHT → AUDIENCE → MESSAGE → ASK → ACTION → RESULT → LEARNING**

| | | |
|---|---|---|
| 01 | **DATA + STRATEGY** | Shelter dashboard • donor movement • CRM coding • executive / board reporting |
| 02 | **WRITING + STEWARDSHIP** | Annual appeal • Giving Tuesday • monthly giving • sponsorship • executive donor acknowledgment |
| 03 | **ANNUAL GIVING OPERATIONS** | FY calendar • register • build-back • development budget • gift processing |
| 04 | **PIPELINE + COMMUNITY** | Employee giving • donor portfolios • major-gift handoff • community partnership |

**EVIDENCE DISCIPLINE**

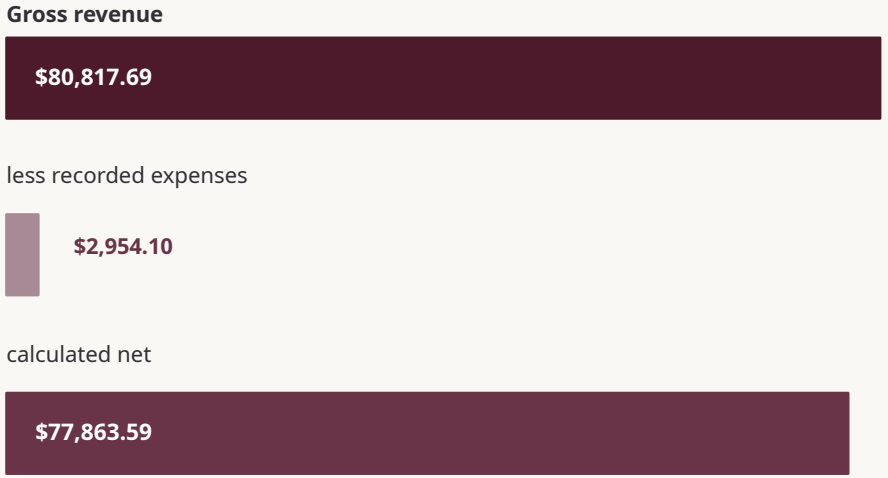
Verified metrics are used where evidence exists. Calculations are labeled. Historical language stays historical. Authorship and executive edits are distinguished instead of blurred.

# Shelter | Campaign Performance Dashboard

FY25 Year-End Appeal + Giving Tuesday • what the numbers changed

| $80,817.69 | $2,954.10 | $77,863.59 | $81,430 | 95.62% |
|---|---|---|---|---|
| COMBINED GROSS | RECORDED EXPENSES | CALCULATED NET | NET GOAL | GOAL ATTAINMENT |

## GROSS → EXPENSE → NET




## NET VS. NET GOAL




**$3,566.41 remaining**

### WHAT THIS DATA CHANGED

1. Build a second-gift path for new donors.
2. Separate lapsed-donor reactivation from broad annual appeals.
3. Move upgrade candidates toward personal cultivation.

*Historical working figures; calculated fields are labeled. Net is compared with the stated net goal. No invalid retention calculation is used.*

# Shelter | Who Responded — and What Did They Do?

Segmentation matters when it changes the next donor action.

| SEGMENT | EVIDENCE IN THE WORK | FUNDRAISING OBJECTIVE |
|---|---|---|
| Mass grassroots | Broad audience; therapeutic supplies/sessions highlighted. | Acquire • retain • identify upgrade potential |
| Mid-level | Family reunification and crisis-intervention framing. | Deepen relationship • surface major-gift potential |
| Major | Holistic / mission-level support framing. | Invite larger partnership • coordinate executive ownership |
| Lapsed | Previously giving donors in reactivation activity. | Re-engage with relevant, timely messaging |
| New | Unsolicited and campaign-acquired donors. | Capture source • welcome well • create second-gift path |

DOCUMENTED MOVEMENT

### YEAR-END APPEAL

2 grassroots → mid-level
1 mid-level → major
1 lapsed donor reactivated
1 in-kind donor converted to financial

### GIVING TUESDAY

4 lapsed donors reactivated
5 completely new donors documented
1 grassroots → mid-level
1 company match

*Movement counts are shown as documented campaign events, not as mutually exclusive unique-donor totals.*

# From Data to Decision

The point is not the dashboard itself. It is knowing what I would do differently because of what it shows.

### CLEAN

Validate fields, dates, segments, source codes and duplicates.

### CALCULATE

Create transparent measures and derived fields.

### VISUALIZE

Put only decision-useful metrics on the page.

### INTERPRET

Explain the donor behavior behind the number.

### DECIDE

Change the next ask, follow-up, segment or handoff.

## REPRODUCIBLE LOGIC

### FORMULAS

Net Revenue = Gross - Expenses
Goal Attainment = Net / Net Goal
Average Gift = Revenue / Donor Count

### WHAT CODING / ANALYTICAL SKILL LOOKS LIKE

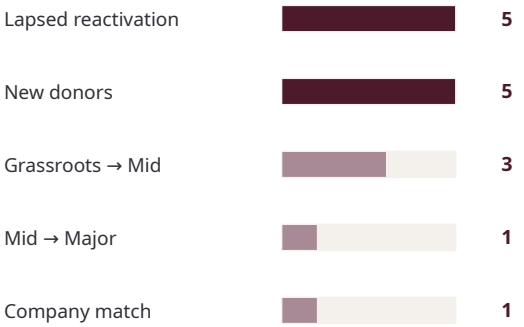
Structured tables • calculated fields • validation • conditional logic • segmentation rules • QA checks • dashboard construction • reproducible calculations

## DECISION DASHBOARD

**$77.9K**
NET

**95.62%**
GOAL

### MOVEMENT SIGNALS

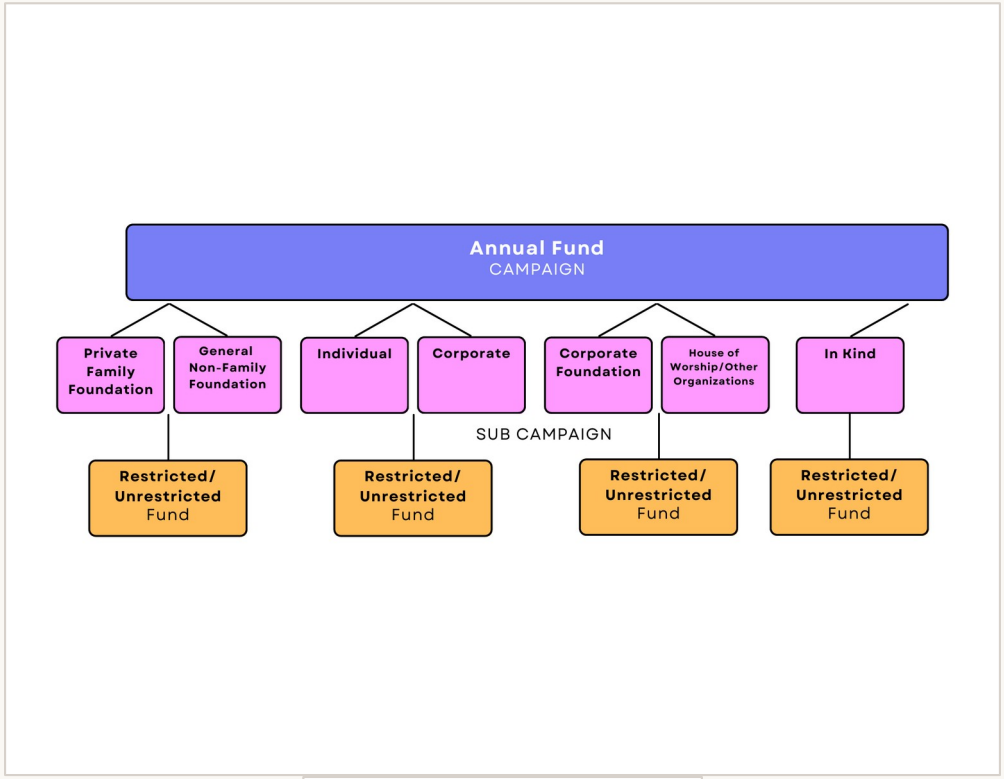


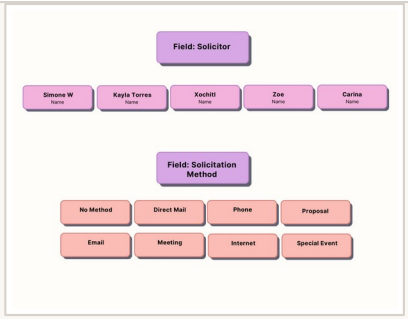

*I want every chart to answer one question: what needs attention next?*

*Movement signals use supported campaign events; categories are not treated as additive unique donors.*

# Shelter | CRM Architecture That Supports Fundraising

Trustworthy donor history makes segmentation, stewardship and reporting possible.




## CAMPAIGN

Which campaign generated the gift?

## SOURCE

Where did the relationship originate?

## METHOD

How was the donor solicited?

## SOLICITOR

Who owns follow-up?

## FUND / RESTRICTION

What may the gift support?

## TAGS / SEGMENTS

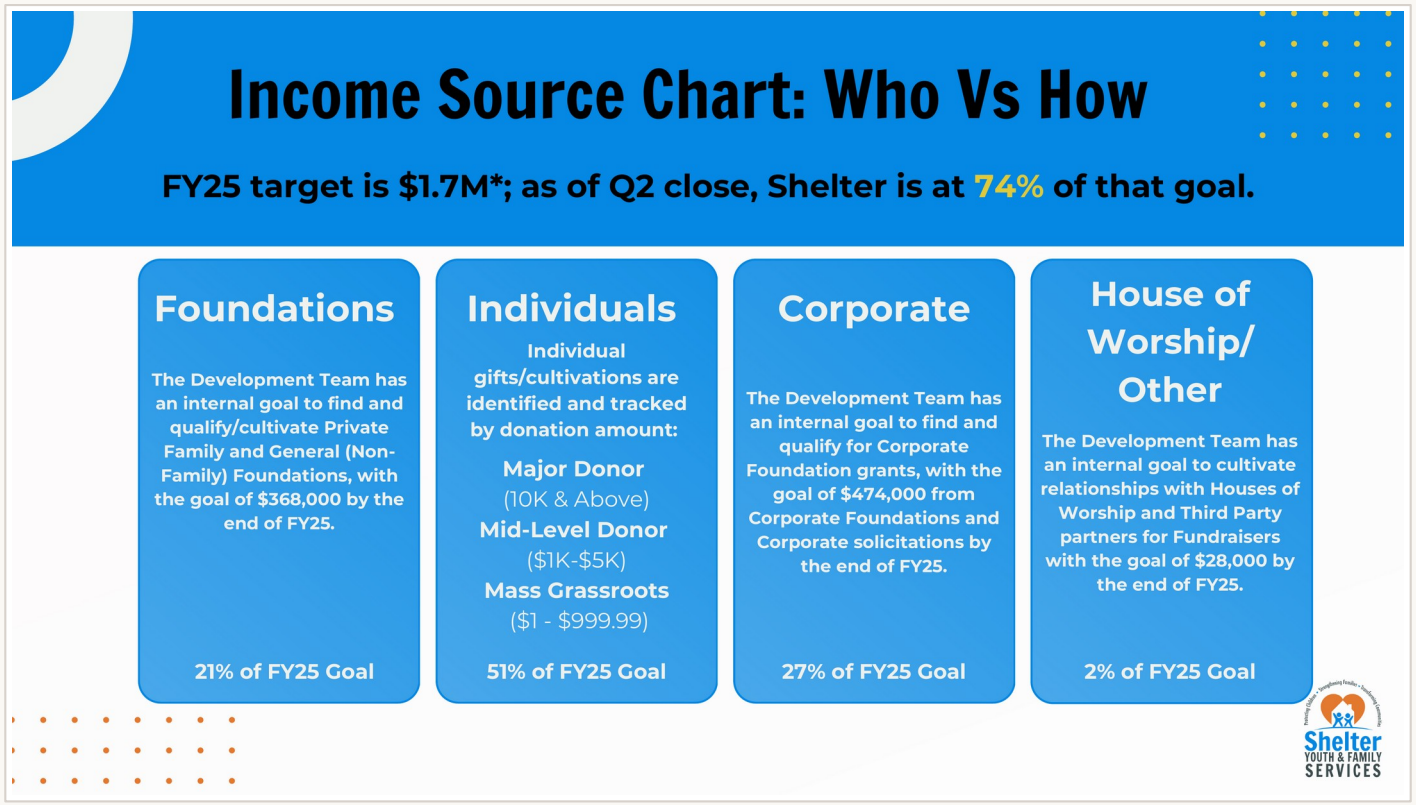
Who should receive which future communication?

*TRUSTWORTHY DATA → SEGMENTATION → ASK → STEWARDSHIP → PIPELINE*

*Actual FY25 Neon One Coding exhibit. No donor-level records are shown.*

# Shelter | Executive / Board Communication

Turning fundraising data into a decision conversation.




### WHAT LEADERSHIP NEEDED

A concise view of where revenue was coming from, progress to goal and what each source required next.

### HOW I ORGANIZED IT

Foundations • Individuals • Corporate • Houses of Worship / Other, each tied to a target or donor level.

### WHY IT MATTERS

Executive writing is different from donor writing: it compresses complexity so leadership can act.

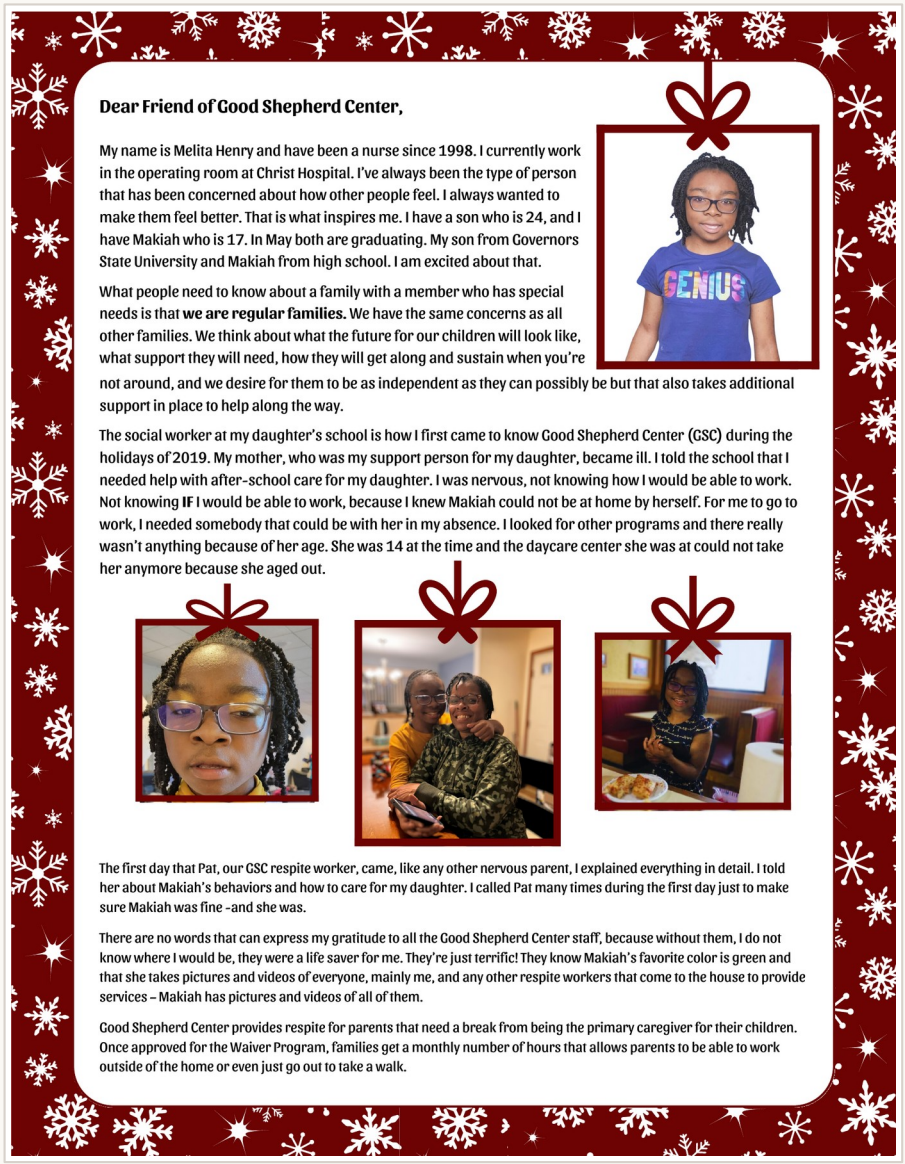
**SELECTED ORIGINAL LANGUAGE**

*"FY25 target is $1.7M*; as of Q2 close, Shelter is at 74% of that goal."*

*Authored/developed by Kayla Moore for leadership delivery. Presented by Simone Wheeler, CFRE. Internal financial figures require context before external reuse.*

# Good Shepherd | Annual Fund Appeal — Story + Mission

Original appeal page 1 shown at readable scale. Parent testimony is preserved as the source story.



**Dear Friend of Good Shepherd Center,**

My name is Melita Henry and have been a nurse since 1998. I currently work in the operating room at Christ Hospital. I've always been the type of person that has been concerned about how other people feel. I always wanted to make them feel better. That is what inspires me. I have a son who is 24, and I have Makiah who is 17. In May both are graduating. My son from Governors State University and Makiah from high school. I am excited about that.




What people need to know about a family with a member who has special needs is that **we are regular families.** We have the same concerns as all other families. We think about what the future for our children will look like, what support they will need, how they will get along and sustain when you're not around, and we desire for them to be as independent as they can possibly be but that also takes additional support in place to help along the way.

The social worker at my daughter's school is how I first came to know Good Shepherd Center (GSC) during the holidays of 2019. My mother, who was my support person for my daughter, became ill. I told the school that I needed help with after-school care for my daughter. I was nervous, not knowing how I would be able to work. Not knowing **IF** I would be able to work, because I knew Makiah could not be at home by herself. For me to go to work, I needed somebody that could be with her in my absence. I looked for other programs and there really wasn't anything because of her age. She was 14 at the time and the daycare center she was at could not take her anymore because she aged out.







The first day that Pat, our GSC respite worker, came, like any other nervous parent, I explained everything in detail. I told her about Makiah's behaviors and how to care for my daughter. I called Pat many times during the first day just to make sure Makiah was fine -and she was.

There are no words that can express my gratitude to all the Good Shepherd Center staff, because without them, I do not know where I would be, they were a life saver for me. They're just terrific! They know Makiah's favorite color is green and that she takes pictures and videos of everyone, mainly me, and any other respite workers that come to the house to provide services – Makiah has pictures and videos of all of them.

Good Shepherd Center provides respite for parents that need a break from being the primary caregiver for their children. Once approved for the Waiver Program, families get a monthly number of hours that allows parents to be able to work outside of the home or even just go out to take a walk.

PARENT VOICE — ORIGINAL SOURCE STORY

*"What people need to know about a family with a member who has special needs is that we are regular families. We have the same concerns as all other families."*

## CAMPAIGN ROLE

I developed the annual-fund piece around a family story, mission context and a donor invitation. I distinguish my development work from the parent's testimony.

## EDITORIAL JUDGMENT

The story gives the reader a specific lived experience before the organization explains the service. The family remains the narrator rather than becoming a generic "case."

## EVIDENCE BOUNDARY

The surviving version is the final executive-edited appeal. A fuller working draft has not been recovered, so I do not present this as sole authorship.

# Good Shepherd | Annual Fund Appeal — Invitation + Ask

Original appeal page 2 shown at readable scale.



Without GSC, my life would be stressful worrying about the daily tasks. Without their support, I would not be able to keep my job. I would need to reduce my availability to part time, which would not allow me to provide for my family.

It is really worth donating to Good Shepherd Center, because I believe that the services that they provide go above and beyond what people know or expect. When you donate, you are partnering with GSC to help so many other families like mine. I know that the demand for their services is getting greater, because when requesting respite hours, some staff are on different assignments. Donations would be greatly appreciated by the families serviced because that would give a way for even more to receive those services and workers will be able to reach those families that require respite care for a much-needed break or to provide for their family.

With Gratitude,

Melita Henry



**Dear Friends,**

All of us at Good Shepherd Center wish you a very happy Holiday Season and a prosperous New Year! As you can see in the story one of our parents shared on the other side of this page, we continue to provide high quality services for those needing our support. This past year we were honored to serve over 550 unduplicated families and childcare Providers to empower them to lead exceptional lives.

While we stay true to our mission, we always seek opportunities to improve the lives of families in our area. As an example, we recently acquired property to increase the number of children we serve in day care services from 66 to 166. This expansion will also lead to new opportunities such as training adults with developmental disabilities to get jobs in childcare settings.

Please join us in our mission by donating to Good Shepherd Center and partner with us in improving the lives of many!

Sincerely,

Brendan McCormick

Executive Director

Good Shepherd Center

DONOR ROLE — ORIGINAL FINAL COPY

*“When you donate, you are partnering with GSC to help so many other families like mine.”*

## WHAT THE FINAL VERSION PRIORITIZED

A direct family-to-donor invitation followed by an organizational message from the Executive Director.

## WHAT I WOULD TEST TODAY

A more specific ask string, tighter CTA placement and clearer segmentation between repeat donors, lapsed donors and first-time prospects.

## EVIDENCE DISCIPLINE

I preserve the final historical artifact exactly and separate current recommendations from what originally ran.

# Good Shepherd | Giving Tuesday — Concrete Impact Asks

Digital fundraising works better when the donor can see an entry point.




### ASK LADDER

$25 • $50 • $75 • $100
Concrete amounts turn “support us” into a choice.

### CTA

“DONATE NOW” is visually dominant and repeated rather than buried in copy.

### AUDIENCE LOGIC

Multiple gift levels create accessible entry points without requiring every donor to see the same ask as equally appropriate.

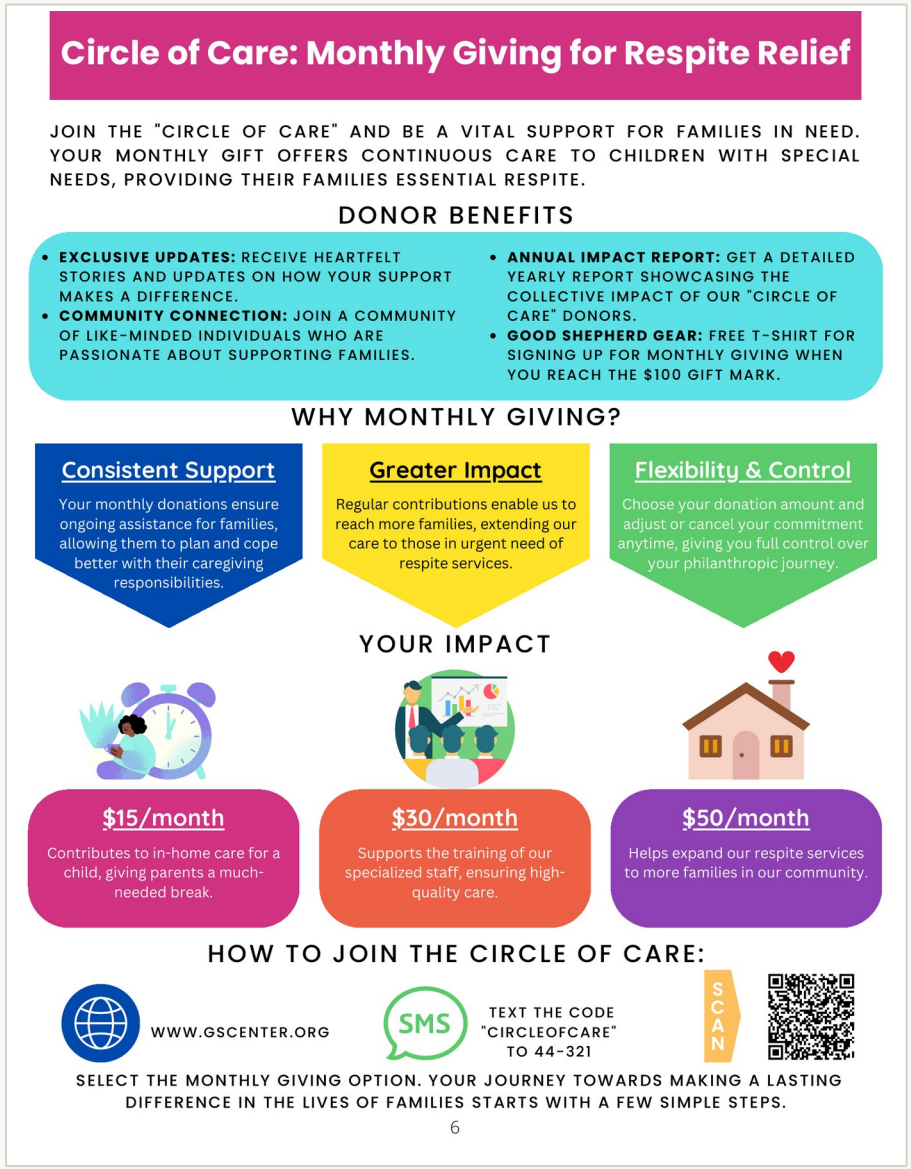
### EVIDENCE BOUNDARY

The $1,000 figure in the campaign design is a goal; this portfolio does not present it as a verified result.

*Actual original Giving Tuesday design. Historic impact amounts are shown as they appeared in the source.*

# Good Shepherd | Circle of Care

From a one-time gift to an ongoing donor relationship.



## Circle of Care: Monthly Giving for Respite Relief

JOIN THE "CIRCLE OF CARE" AND BE A VITAL SUPPORT FOR FAMILIES IN NEED. YOUR MONTHLY GIFT OFFERS CONTINUOUS CARE TO CHILDREN WITH SPECIAL NEEDS, PROVIDING THEIR FAMILIES ESSENTIAL RESPITE.

### DONOR BENEFITS

- **EXCLUSIVE UPDATES:** RECEIVE HEARTFELT STORIES AND UPDATES ON HOW YOUR SUPPORT MAKES A DIFFERENCE.
- **COMMUNITY CONNECTION:** JOIN A COMMUNITY OF LIKE-MINDED INDIVIDUALS WHO ARE PASSIONATE ABOUT SUPPORTING FAMILIES.
- **ANNUAL IMPACT REPORT:** GET A DETAILED YEARLY REPORT SHOWCASING THE COLLECTIVE IMPACT OF OUR "CIRCLE OF CARE" DONORS.
- **GOOD SHEPHERD GEAR:** FREE T-SHIRT FOR SIGNING UP FOR MONTHLY GIVING WHEN YOU REACH THE $100 GIFT MARK.

### WHY MONTHLY GIVING?

**Consistent Support**
Your monthly donations ensure ongoing assistance for families, allowing them to plan and cope better with their caregiving responsibilities.

**Greater Impact**
Regular contributions enable us to reach more families, extending our care to those in urgent need of respite services.

**Flexibility & Control**
Choose your donation amount and adjust or cancel your commitment anytime, giving you full control over your philanthropic journey.

### YOUR IMPACT

**$15/month**
Contributes to in-home care for a child, giving parents a much-needed break.

**$30/month**
Supports the training of our specialized staff, ensuring high-quality care.

**$50/month**
Helps expand our respite services to more families in our community.

### HOW TO JOIN THE CIRCLE OF CARE:

WWW.GSCENTER.ORG

SMS TEXT THE CODE "CIRCLEOFCARE" TO 44-321

SCAN

SELECT THE MONTHLY GIVING OPTION. YOUR JOURNEY TOWARDS MAKING A LASTING DIFFERENCE IN THE LIVES OF FAMILIES STARTS WITH A FEW SIMPLE STEPS.

6

*Original Circle of Care page from Winter Edifice 2024. Historic impact language is preserved as published.*

**ORIGINAL INVITATION**

*"Join the 'Circle of Care' and be a vital support for families in need. Your monthly gift offers continuous care..."*

### DONOR CONTROL

The original copy gives donors flexibility to choose, adjust or cancel. The goal was not just a recurring charge; it was giving donors a clear way to stay connected.

### MONTHLY LADDER

$15/month • $30/month • $50/month
Different levels make recurring giving feel concrete and attainable.

### STEWARDSHIP BUILT INTO THE OFFER

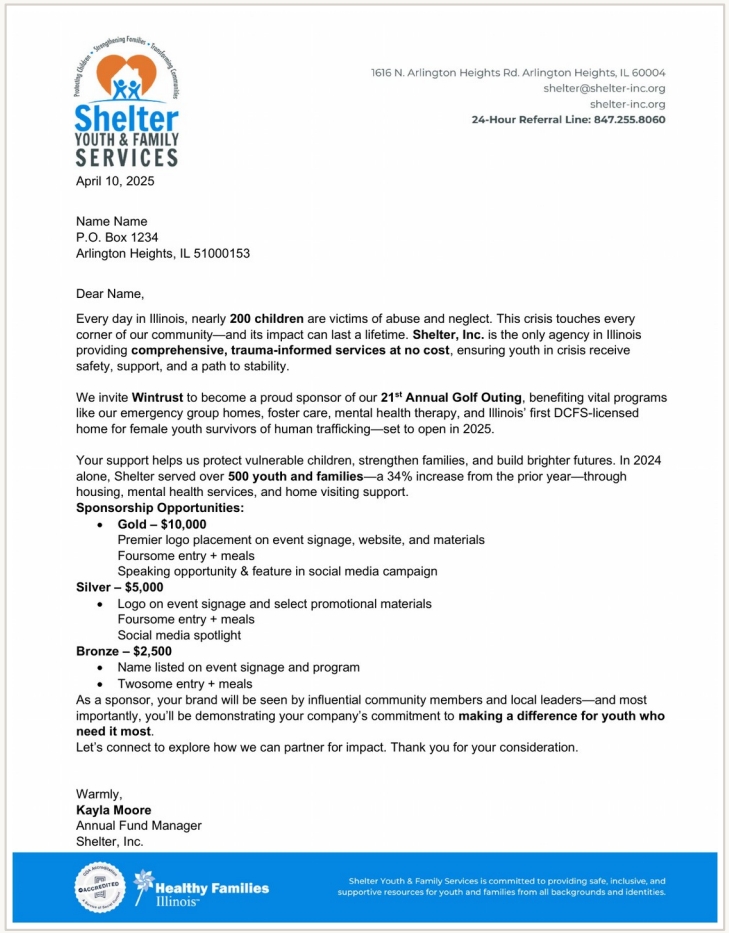
Exclusive updates, community connection and an annual impact report communicate what happens after the donor says yes.

# Shelter | Sponsorship — Data → Relationship → Ask

Historical partner behavior informed who to renew, upgrade, reactivate or personally cultivate.

| Campaign Name | Donation Total |
|---|---|
| Golf 2023 | $56,212 |
| Golf 2021 | $62,665 |
| Golf 2022 | $52,590 |
| Grand Total | 171467 |

| Sum of Donation Amount | | Campaign Name | | |
|---|---|---|---|---|
| Company Name | Full Name (F) | Golf 2023 | Golf 2022 | Golf 2021 |
| ⊞ CORPORATE PARTNER 01 | | $3,147 | $80.00 | |
| ⊟ CORPORATE PARTNER 02 | | | | |
| | CONTACT REDACTED | | $200.00 | |
| ⊟ CORPORATE PARTNER 03 | | | | |
| | | $2,000.00 | $1,500.00 | $1,500.00 |
| | CONTACT REDACTED | | | $1,500.00 |
| ⊟ CORPORATE PARTNER 04 | | | | |
| | CONTACT REDACTED | $1,500.00 | | $2,250.00 |
| ⊟ CORPORATE PARTNER 05 | | | | |
| | | $2,500.00 | $2,500.00 | $2,500.00 |
| ⊟ CORPORATE PARTNER 06 | | | | |
| | | $1,500.00 | | |
| ⊟ CORPORATE PARTNER 07 | | | | |
| | CONTACT REDACTED | | | $500.00 |
| ⊟ CORPORATE PARTNER 08 | | | | |
| | CONTACT REDACTED | $900.00 | $750.00 | $2,000.00 |



Shelter Youth & Family Services

1616 N. Arlington Heights Rd. Arlington Heights, IL 60004
shelter@shelter-inc.org
shelter-inc.org
**24-Hour Referral Line: 847.255.8060**

April 10, 2025

Name Name
P.O. Box 1234
Arlington Heights, IL 51000153

Dear Name,

Every day in Illinois, nearly **200 children** are victims of abuse and neglect. This crisis touches every corner of our community—and its impact can last a lifetime. **Shelter, Inc.** is the only agency in Illinois providing **comprehensive, trauma-informed services at no cost**, ensuring youth in crisis receive safety, support, and a path to stability.

We invite **Wintrust** to become a proud sponsor of our **21st Annual Golf Outing**, benefiting vital programs like our emergency group homes, foster care, mental health therapy, and Illinois' first DCFS-licensed home for female youth survivors of human trafficking—set to open in 2025.

Your support helps us protect vulnerable children, strengthen families, and build brighter futures. In 2024 alone, Shelter served over **500 youth and families**—a 34% increase from the prior year—through housing, mental health services, and home visiting support.

**Sponsorship Opportunities:**

- **Gold – $10,000**
  Premier logo placement on event signage, website, and materials
  Foursome entry + meals
  Speaking opportunity & feature in social media campaign

**Silver – $5,000**

- Logo on event signage and select promotional materials
  Foursome entry + meals
  Social media spotlight

**Bronze – $2,500**

- Name listed on event signage and program
- Twosome entry + meals

As a sponsor, your brand will be seen by influential community members and local leaders—and most importantly, you'll be demonstrating your company's commitment to **making a difference for youth who need it most**.
Let's connect to explore how we can partner for impact. Thank you for your consideration.

Warmly,
**Kayla Moore**
Annual Fund Manager
Shelter, Inc.

Healthy Families Illinois

Shelter Youth & Family Services is committed to providing safe, inclusive, and supportive resources for youth and families from all backgrounds and identities.

## DATA

Multi-year sponsor history shows recency, level and movement across campaigns.

## DECISION

Use giving history to prioritize renewal, upgrade and reactivation. Then ask: 'What would make this partnership valuable to your team?'

## WRITING

Translate the opportunity into a concrete partnership offer with clear levels and CTA.

## EVIDENCE

Original Shelter working materials; partner identities are anonymized for interview review.

*Working sponsorship solicitation + anonymized historical Golf sponsorship data. The exhibit demonstrates pipeline judgment as well as copywriting.*

# Shelter | Major-Donor Stewardship in Leadership Voice

Writing gratitude that is specific, mission-connected and future-facing.



Shelter
YOUTH & FAMILY
SERVICES

1616 N. Arlington Heights Rd. Arlington Heights, IL 60004
shelter@shelter-inc.org
shelter-inc.org
**24-Hour Referral Line: 847.255.8060**

May 9, 2025

[redacted]

Dear Kristin,

On behalf of everyone at Shelter, Inc., I extend my heartfelt thanks fo[redacted]aordinary generosity in supporting our 50th Anniversary Celebration with a gift of $1,100 to the Paddle Raise and Drop.

Your contribution helped make April 26, 2025, not only a beautiful evening of gratitude, but a tangible investment in the future of the most vulnerable youth in our community. Thanks to your support, we continue to provide a safe place, a stable foundation, and a healthy family for children and teens who are navigating the unimaginable, often through no fault of their own.

As you know, for five decades, Shelter has stood as a lifeline to youth facing crisis. Your generosity ensures that we can carry this mission forward—responding 24/7 with compassionate care, trauma-informed support, and holistic services that allow young people to heal, grow, and thrive.

It means so much to celebrate this milestone year with individuals like you, who see the worth and potential in every child. Your belief in our mission fuels the work we do daily and strengthens our resolve to break the cycle of abuse and neglect.

Together, we are not just honoring Shelter's history—we are shaping its future.

Watch out for photos online!

With deepest gratitude,

**Carina Santa Maria**
Executive Director

*No goods or services were received in exchange for this contribution. Shelter, Inc. is a registered 501c3 nonprofit corporation. Contributions are tax-deductible to the fullest extent of the law.*

ACCREDITED
Healthy Families Illinois

Shelter Youth & Family Services is committed to providing safe, inclusive, and supportive resources for youth and families from all backgrounds and identities.

## SELECTED ORIGINAL LANGUAGE

*"Together, we are not just honoring Shelter's history—we are shaping its future."*

## AUDIENCE

Engaged 50th Anniversary donor receiving a personalized post-event acknowledgment.

## MY ROLE

Drafted stewardship correspondence for Executive Director Carina Santa Maria's signature.

## WRITING DECISION

Specific gift → mission impact → donor belief → future of the organization.

## WHY IT MATTERS

Shows executive voice adaptation and donor relationship writing after the gift.

*Donor-identifying information redacted. Original May 9, 2025 Shelter acknowledgment drafted by Kayla Moore for Executive Director signature.*

# Annual Giving as an Operating System

Scaling month-by-month campaign discipline into a July–June annual giving program.

At Bimbo, I learned to manage campaigns against a shared calendar with clear start/stop windows and production deadlines. I carried that operating discipline into annual giving — then expanded it to account for donor lifecycle, segmentation, multichannel production, stewardship, suppression, reporting and testing.

**PLAN**

Map campaign windows, capacity and deadlines.

**SEGMENT**

Decide who receives which message, ask and channel.

**EXECUTE**

Coordinate copy, creative, data, QA and ownership.

**LEARN**

Close the loop with results, donor movement and the next test.

THE OPERATING QUESTION

*What needs to be planned now so the donor experience still feels intentional three months from now?*

*The calendar is not just when we ask. It shows when we plan, when we build, whom we contact, when we stop asking — and what happens next.*

*Illustrative dates and goals are portfolio examples, not PRC historical plans or results.*

# FY Annual Giving Operating Calendar

Campaign Cadence • Donor Lifecycle • Stewardship • Data & Production

| PROGRAM / WORKSTREAM | JUL | AUG | SEP | OCT | NOV | DEC | JAN | FEB | MAR | APR | MAY | JUN |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| **REVENUE CAMPAIGNS** | | | | | | | | | | | | |
| Fall Annual Appeal | P | B | L | L | S | | | | | | | |
| GivingTuesday | | | P | B | B | L/S | | | | | | |
| Calendar Year-End Appeal | | P | B | B | L | L/S | | | | | | |
| Year-End Digital Countdown | | | | P | B | L/S | | | | | | |
| Spring Annual Appeal | | | | | | | P | B | B | L | S | |
| Targeted Acquisition / Prospect Test | | | | | | | | P | B | L | S | |
| **DONOR LIFECYCLE + STEWARDSHIP** | | | | | | | | | | | | |
| First-Time Donor Second-Gift Journey | L | L | L | L | L | L | L | L | L | L | L | L |
| Monthly / Sustainer Conversion | P | B | L | L | L | L | L | L | L | L | L | L |
| Mid-Level Cultivation + Major-Gift Handoff | L | L | L | L | L | L | L | L | L | L | L | L |
| LYBUNT Reactivation | P | B | L | L | S | | | | | | | |
| SYBUNT Reactivation | | | | | | | | P | B | L | S | |
| Summer Impact / No-Ask Touch | S | S | | | | | | | | | P | S |
| Year-End Thank-You / Impact | | | | | S | S | S | | | | | |
| **ANNUAL FUND OPERATIONS** | | | | | | | | | | | | |
| Prior-Year Analysis + FY Goal / Budget | L | L | | | | | | | | | P | B |
| Segmentation Refresh + CRM/Data Hygiene | L | L | L | L | L | L | L | L | L | L | L | L |
| Campaign Briefs + Story Sourcing | P | B | B | P | B | | P | B | B | | P | B |
| Ask Strings + Offer Strategy | | B | B | | B | | | B | B | | | |
| Creative / Copy Production | | B | B | B | B | B | | B | B | B | | |
| Data Pulls + Suppression + QA | | B | L | B | L | L | | B | L | L | | |
| Vendor / Production Management | | B | L | B | L | L | | B | L | L | | |
| Campaign Reporting + KPI Review | L | S | S | S | S | S | L | S | S | S | S | S |
| Testing Roadmap | P | B | L | S | P | L | P | B | L | S | P | B |
| Next-FY Calendar + Budget Build | | | | | | | | | | P | B | L |

**PHASE KEY**

| | |
|---|---|
| P | Planning |
| B | Build / Creative / Data |
| L | Live Solicitation |
| S | Stewardship / Reporting |

# Campaign Register | Strategy + Timing

The portfolio view is simple; the operating layer underneath is specific.

| Campaign / Program | Objective | Segment | Planning | Creative | Data Lock | Launch | End | Channels | Owner |
|---|---|---|---|---|---|---|---|---|---|
| Fall Annual Appeal | Renew / upgrade | Active annual + upgrade prospects | Jul 1 | Aug 5 | Aug 20 | Sep 5 | Oct 15 | Mail • Email • Web • Social | Annual Giving |
| GivingTuesday | Digital revenue / acquisition | Digital • lapsed • prospects | Aug 15 | Oct 15 | Nov 15 | Nov 30 | Nov 30 | Email • Social • Web | Annual Giving + Comms |
| Calendar Year-End Appeal | Peak annual-fund revenue | Active • LYBUNT • upgrade • selected lapsed | Aug 1 | Sep 25 | Oct 20 | Nov 10 | Dec 31 | Mail • Email • Web • Social | Annual Giving |
| Year-End Digital Countdown | Convert non-responders | Digital-first + mail non-responders | Sep 15 | Nov 20 | Dec 15 | Dec 20 | Dec 31 | Email • Web • Social | Annual Giving + Comms |
| Spring Annual Appeal | Renew / upgrade | Active • LYBUNT • upgrade prospects | Jan 5 | Feb 10 | Feb 25 | Mar 15 | Apr 30 | Mail • Email • Web • Social | Annual Giving |
| First-Time Donor Second-Gift | Improve second-gift conversion | First gift within 0–12 months | Jul 1 | Jul 15 | Jul 15 | Jul 20 | Jun 30 | Triggered Email • Note • Mail | Annual Giving |
| Monthly / Sustainer Conversion | Build recurring revenue | Repeat one-time + digital donors | Jul 1 | Aug 1 | Aug 10 | Aug 15 | Jun 30 | Email • Web • Mail insert | Annual Giving |
| Mid-Level Cultivation | Qualify / upgrade / hand off | High-value annual + capacity/engagement signals | Jul 1 | Jul 15 | Jul 15 | Jul 20 | Jun 30 | Personal Email • Call • Mail | Annual + Major Gifts |
| LYBUNT Reactivation | Recover recently lapsed | LYBUNT | Jul 1 | Aug 1 | Aug 15 | Sep 1 | Oct 31 | Mail • Email • Priority Phone | Annual Giving |
| SYBUNT Reactivation | Recover longer-lapsed | SYBUNT | Jan 15 | Feb 20 | Mar 1 | Mar 20 | May 1 | Mail • Email • Priority Phone | Annual Giving |
| Summer Impact / No-Ask | Stewardship | By interest / program / tenure | Apr 15 | May 20 | May 25 | Jun 5 | Jun 30 | Email • Newsletter • Optional Mail | Annual Giving + Comms |

*Illustrative timing and revenue goals are portfolio examples, not PRC historical plans or budgets.*

# Campaign Register | Measurement + Control

A campaign also needs rules for success, suppression, QA and next action.

| Campaign | Illustrative Goal | Primary KPI | Secondary KPI | Suppression Rule | QA Requirement | Status |
|---|---|---|---|---|---|---|
| Fall Annual Appeal | $300K | Net revenue / response | Average gift / upgrade | Suppress gifts received after final data pull; coordinate major-gift exceptions | Gift strings • segment codes • reply device • links | Planned |
| GivingTuesday | $125K | Conversion rate | New donors / recurring conversion | Real-time suppression as gifts arrive | Links • mobile • consent • tracking | Planned |
| Calendar Year-End Appeal | $1.0M | Net revenue | Response / avg gift / upgrade | Frequent donor suppression; major-gift coordination | Segment counts • ask strings • gift codes • landing page | Planned |
| Year-End Digital Countdown | — | Digital conversion | Revenue / send | Daily/near-real-time donor suppression | Links • render • donation form • source code | Planned |
| Spring Annual Appeal | $350K | Net revenue / response | Reactivation / upgrade | Suppress post-pull gifts; separate active/lapsed | Ask strings • segment QA • source coding | Planned |
| First-Time Donor Second-Gift | — | Second-gift rate | Days to second gift | Suppress duplicate welcome / appeal sequences | Trigger logic • gift date • source • opt-out | Ongoing |
| Monthly / Sustainer Conversion | $150K | New sustainers | 12-month retained value | Exclude existing sustainers | Recurring form • cancellation language • source | Ongoing |
| Mid-Level Cultivation | — | Qualified upgrades / handoffs | Retention / next action | Coordinate ownership with major gifts | Next action • owner • stage • contact report | Ongoing |
| LYBUNT Reactivation | $200K | Reactivation rate | Avg reactivated gift | Exclude already renewed; split high-value lapsed | Recency • prior gift • segment • source | Planned |
| SYBUNT Reactivation | $100K | Reactivation rate | Cost / reactivated donor | Exclude DNC + recent renewed donors | History • affinity • deceased/duplicate cleanup | Planned |
| Summer Impact / No-Ask | — | Engagement | Retention readiness | No broad ask unless strategy changes | Story permissions • links • preference center | Planned |

*The register makes hidden management work visible: what counts as success, who should stop receiving the ask, and what has to be checked before anything goes out.*

# Campaign Build-Back | Start With the Launch Date

A launch date is useful only if the production path behind it is visible.

EXAMPLE LAUNCH / MAIL DROP

## MARCH 15

Spring Annual Appeal

BUILD-BACK PRINCIPLE

*Plan backward from the moment the donor sees the message — not forward from the day the team starts talking about it.*

This protects Q4 capacity: year-end creative, data, production and stewardship are already moving before November arrives.

| | | |
|---|---|---|
| D-70 | **Goal / Budget / Segment Lock** | Confirm objective, goal, budget, audience, channels and test plan. |
| D-56 | **Story / Offer / Creative Brief** | Confirm case for support, facts, permissions, donor role and CTA. |
| D-42 | **First Copy + Design Draft** | Draft mail, email, web and supporting creative. |
| D-35 | **Ask Strings + Data Criteria** | Define segment rules, gift strings, source codes and exclusions. |
| D-28 | **Program / Finance / Comms Review** | Check accuracy, dignity, financial claims and brand alignment. |
| D-18 | **Final Creative Lock** | End substantive copy changes; move to production QA. |
| D-12 | **Final Data Pull + Suppression** | Dedupe, remove recent gifts and validate coding. |
| D-8 | **Vendor / Production Release** | Release print/mail or schedule digital production. |
| D-3 | **Final QA / Seed Check** | Verify personalization, source codes, links and proofs. |
| **D-0** | **LAUNCH** | Campaign begins. |
| D+1 | **Response + Stewardship Trigger** | Monitor response and begin acknowledgments immediately. |
| D+14 | **Initial Results Review** | Review early revenue, response, movement and issues. |
| D+45 | **Campaign Close / Learning Review** | Compare goals, net results, tests and next donor actions. |

# Development Budget + Forecasting

Annual giving management includes deciding where donor experience, communications and revenue support receive resources.

| Expenses | July | August | September | October | November | December | January |
|---|---|---|---|---|---|---|---|
| Creating the Donor Experience | | | | | | | |
| Donor Cultivation & Stewardship (lunches / dinners) | • | • | • | • | • | • | • |
| Donor Visits- Mileage | • | • | • | • | • | • | • |
| Major/Mid-level Donor Events | • | | • | | • | • | • |
| Donor Recognition | • | • | • | • | • | • | • |
| Subtotal | • | • | • | • | • | • | • |
| Marketing and Communications (AGENCY) | | | | | | | |
| Community Education Series Support Materials | • | • | • | • | • | • | • |
| siplay costs including Banners, signage, tents, step and repeat, etc.) | • | • | • | • | • | • | • |
| SEO and Site Lock-Design/editing beyond basic (Mirar) | • | • | • | • | • | • | • |
| Social Media Campaigns | • | • | • | • | • | • | • |
| Social Media Software (Hootsuite) | • | • | • | • | • | • | • |
| Impact Report | • | • | • | • | • | • | • |
| Advertising - print, broadcast, digital | • | • | • | • | • | • | • |
| Video Production- Mirar Contract | • | • | • | • | • | • | • |
| Publicity - PR professional services | • | • | • | • | • | • | • |
| letterhead, business cards, notepads, note cards | • | • | • | • | • | • | • |

### PLAN

Map donor cultivation, stewardship, recognition, communications and infrastructure costs across the fiscal year.

### MONITOR

Use monthly structure to see when planned activity and spending should occur.

### FORECAST

Connect program timing, donor activity and campaign production to resource needs.

### DECIDE

The budget told me what the fundraising plan could actually support.

*The operating calendar shows when the work happens. The budget shows what the work requires.*

*Selected/redacted exhibit from Development Budget FY25 working file. Internal planning structure shown without sensitive dollar detail.*

# Employee Giving Appeal | What if $1 was enough to start?

Fresh copy written from scratch to show audience-specific fundraising writing, recurring-gift strategy and offer design.

EMPLOYEE EMAIL APPEAL

## Subject: Could $1 per paycheck help a student stay on track?

**Dear Colleagues,**

It may feel like $1 from a paycheck is too small to matter. That is exactly why I would start there.

At College of DuPage, our students are already doing the work of building their futures. They are balancing classes, jobs, families, and the ordinary expenses that do not stop because a semester started. Sometimes the barrier that threatens persistence is not tuition. It is one unexpected expense arriving at exactly the wrong time.

Employee giving gives us a simple way to respond together.

If 30 colleagues give $1 per paycheck, that becomes $780 over 26 pay periods. I would add my own $250 commitment, bringing the potential to $1,030.

**Not giving yet? Start with $1. Already giving? Add $1.**

No one person has to carry the whole need. The point is participation: colleagues choosing together to help keep students connected to the college when something unexpected gets in the way.

**You probably won't notice $1 coming out of a paycheck. A student absolutely can notice what those dollars become.**

Choose the amount that fits you and join the Employee Giving Program.

With gratitude,
Kayla Moore
Employee Giving Champion

PAYCHECK GIVING LADDER

| | |
|---|---|
| **$1** | per paycheck **$26 / year** |
| **$3** | per paycheck **$78 / year** |
| **$5** | per paycheck **$130 / year** |
| **$10** | per paycheck **$260 / year** |

THE COLLECTIVE MATH

**30 × $26 = $780**
**+ $250 personal commitment**
**= $1,030 potential**

WRITING STRATEGY

Surface the hesitation → show the math → connect it to student persistence → make the recurring ask easy to choose.

Written from scratch for this portfolio. Inspired by HBN scholarship/community work and COD student-facing experience; no historical results claimed.

# Shelter | From Gift to Stewardship

The donor experience continues after “submit”: recording, acknowledgment, escalation and next action all need ownership.

Updated 7/31/24

GIFT PROCESSING AND THANKING PLAN

Automated Process (Green)

*Recurring Process Every Morning: Understand batching*

Manual Process (Red)

Weekly Data Entry due each Friday before 12 Noon

| Gift Processed through . . . | Receiving/ Stesm Through | Recorded in NEON | Thanking - Step 1 | Thanking - Step 2 | Thanking - Step 3 |
|---|---|---|---|---|---|
| **Online/Electronic Giving** | | | | | |
| One Time Website Gifts, under $250 | Automatically through Neon/Benevity/One Cause, Card Pointe etc. | Automatically, Immediate | Typed letter with acknowledgement/electronic Signature within 3 days (Executive Director) | - | - |
| One Time Website Gifts, $250 -$999.99 | Automatically through Neon/Benevity/One Cause, Card Pointe etc. | Automatically, Immediate | Typed letter with acknowledgement/electronic Signature within 3 days (Executive Director) | - | - |
| One Time Website Gifts, $1000 -$5000 | Automatically through Neon/Benevity/One Cause, Card Pointe etc. | Automatically, Immediate | Typed letter with acknowledgement/Dual Signature within 3 days (Annual Fund Mgr Torres) | Post it Thank you note (Development Director) | - |
| One Time Website Gifts, $5,000+ | Automatically through Neon/Benevity/One Cause, Card Pointe etc. | Automatically, Immediate | Phone donor within 24 hours (Executive Director/Development Director) | Typed letter with acknowledgement/Dual Signature within 3 days (Annual Fund Mgr) | - |
| First Time Gift Any Amount | Automatically through Neon/Benevity/One Cause, Card Pointe etc. | Automatically, Immediate | Hand written note of 'Welcome, addition to newsletters/emails" (Executive Director) | Size will dictate TY | - |
| Sign Up for Monthly Giving | Automatically through Neon/Benevity/One Cause, Card Pointe etc. | Automatically, Immediate | Hand written note of 'Welcome, addition to newsletters/emails" (Executive Director) | - | - |
| | | | | | |
| **Mailed Checks/ Wires** | | | | | |
| $1-$250 | Post Office Box/ Receive Wire | Manual Entry Daily- Weekly Report (Annual Fund Mgr) | Typed letter with acknowledgement/electronic Signature within 3 days (Executive Director) | - | - |
| $250 - $999.99 | Post Office Box/ Receive Wire | Manual Entry Daily- Weekly Report (Annual Fund Mgr) | Typed letter with acknowledgement/electronic Signature within 3 days (Executive Director) | | |
| $1,000 - $5,000 | Post Office Box/ Receive Wire | Manual Entry Daily- Weekly Report (Annual Fund Mgr) | Phone donor within 24 hours (Development Director) | Typed letter with acknowledgement/Dual Signature within 3 days (Development Director/Executive Director) | Hand written note from ED (Executive Director) |
| $5,000-$10,000 | Post Office Box/ Receive Wire | Manual Entry Daily- Weekly Report (Annual Fund Mgr) | Phone donor within 24 hours (Development Director) | Typed letter with acknowledgement/Dual Signature within 3 days (Development Director/Executive Director) | Hand written note from ED (Executive Director) |
| $10,001 + | Post Office Box/ Receive Wire | Manual Entry Daily- Weekly Report (Annual Fund Mgr) | Phone donor within 24 hours (Development Director/Executive Director/Board Member) | Typed letter with acknowledgement/Dual Signature within 3 days (Development Director/Executive Director) | Hand written note from ED/Board Member (Executive Director/Board Member) |
| | | | | | |

## RECEIVE

Different gift channels enter through different systems and require clear handoffs.

## RECORD

NEON entry and batching create the record that reporting and stewardship depend on.

## ACKNOWLEDGE

Acknowledgment treatment escalates by gift size and relationship — not every donor gets the same touch.

## STEWARD

Phone calls, letters, handwritten notes and leadership involvement are mapped as intentional next steps.

## QA + OWNER

The matrix makes timing and responsibility visible so gratitude is repeatable, not accidental.

*Selected/redacted July 31, 2024 Shelter Gift Processing and Thanking Plan. Working process document shown as development-operations evidence.*

# Shelter | Donor Portfolio + Major-Gift Pipeline

Moving from a donor list to differentiated next actions.

| Account Type | Donor | Relationship / Qualification | Largest Gift | Last Gift | Pipeline Lens | Next Action |
|---|---|---|---|---|---|---|
| Individual | DONOR A | Former associate-board relationship | — | — | QUALIFY / CULTIVATE | Personal outreach / relationship discovery |
| Individual | DONOR B | solicit for BOD | — | — | QUALIFY / CULTIVATE | Personal outreach / relationship discovery |
| Individual | DONOR C | Former associate-board relationship | — | — | QUALIFY / CULTIVATE | Explore referral / partnership opportunity |
| Individual | DONOR D | Existing organizational connection | — | — | QUALIFY / CULTIVATE | Personal outreach / relationship discovery |
| Individual | DONOR E | solicit for new AB as it's developed | — | — | QUALIFY / CULTIVATE | Personal outreach / relationship discovery |
| Individual | DONOR F | Existing organizational connection | — | — | QUALIFY / CULTIVATE | Personal outreach / relationship discovery |
| Individual | DONOR G | Existing organizational connection | — | — | QUALIFY / CULTIVATE | Personal outreach / relationship discovery |
| Individual | DONOR H | BOD pipeline consideration | — | — | QUALIFY / CULTIVATE | Schedule relationship-building conversation |

**IDENTIFY**

Who has giving, engagement or relationship signals worth reviewing?

**QUALIFY**

What do we know about affinity, connection and readiness?

**CULTIVATE**

What relationship-building action comes next?

**SOLICIT**

Who is ready for a specific invitation and at what level?

**STEWARD**

What follow-up protects and deepens the relationship?

*Anonymized original Shelter donor-portfolio working document. Names and identifying details removed; structure retained to show qualification and next-action logic.*

# KAYLA MOORE

Annual Giving • Fundraising Communications • Donor Strategy • Data

*I use data to understand people, writing to make the invitation clear, and systems to make sure stewardship actually happens.*

## WHAT I BRING TO ANNUAL GIVING

I bring the discipline to manage annual giving, the judgment to read donor behavior, and a community perspective that keeps the work human. I want to build fundraising people trust enough to stay part of.

**Thank you for reviewing my work.**

Private Professional Portfolio • For Interview Review • Not for Distribution