

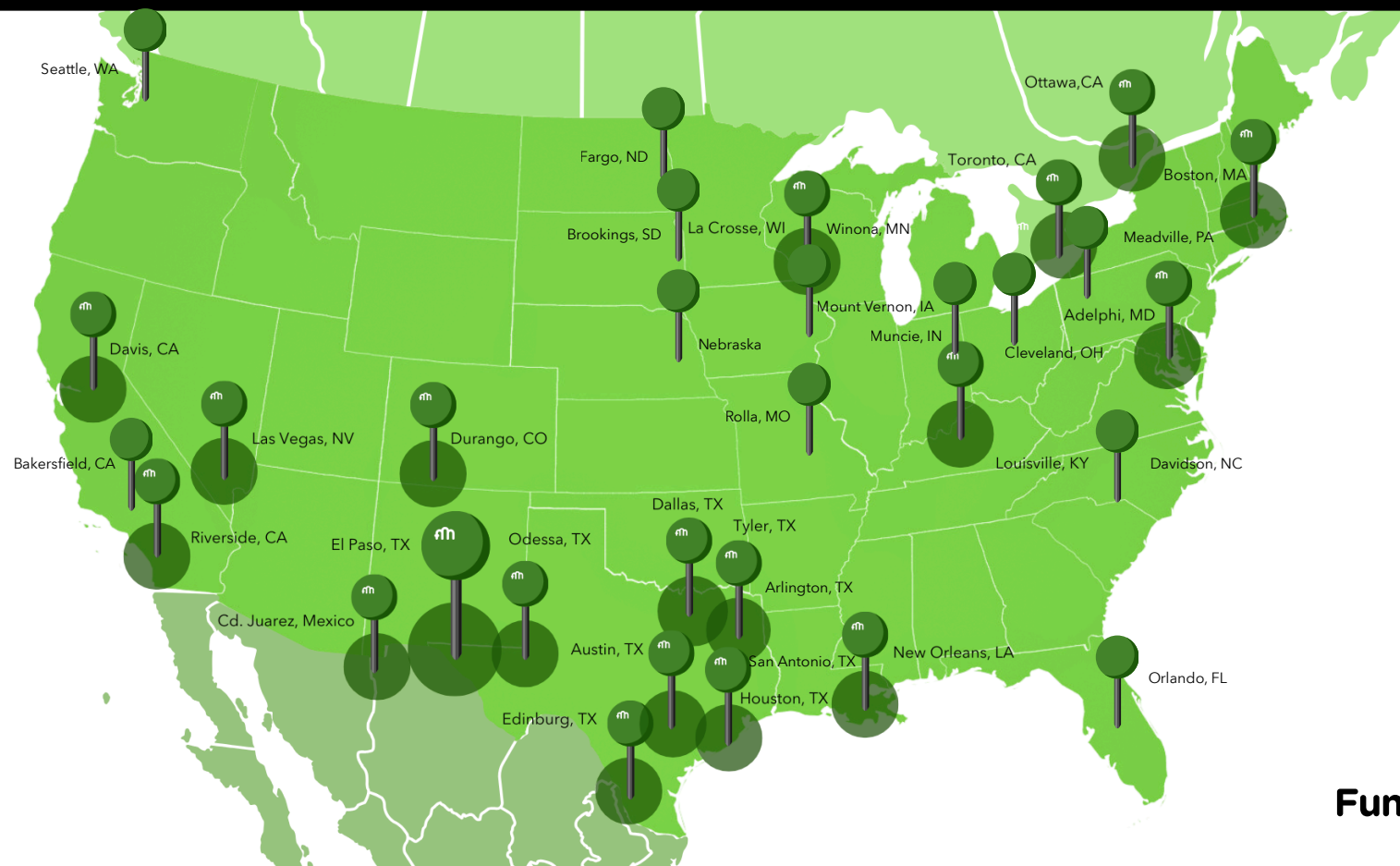


2025 YEAR-END REVIEW



BY THE NUMBERS • TOP PERFORMING WORKS •
BIGGEST ACCOMPLISHMENTS • BEST MOMENTS • HIGHLIGHTS

OUR FOOTPRINT



OPERATING IN

3

COUNTRIES
(USA, MEXICO & CANADA)

NUMBER OF
STATES

22

ACROSS THE U.S.

INDUSTRIES SERVED

HIGHER EDUCATION
HEALTHCARE
COMMUNITY FOUNDATIONS
NONPROFIT

2025

PLATFORM IMPACT

\$7.69B

IN ENDOWMENT VALUE
ON THE PLATFORM

+164%

GROWTH IN USERS

+345%

OF FUNDS MANAGED

J Y FOUNDATION DASHBOARD



Home



Dashboard



My Funds



Stewardship



Important Dates



Internal Resources



Policy Documents

Good morning

We're so glad you're here



Announcements



New fiscal year



The new year



All impact metrics

Pending tasks

Let's have a productive day



Impact Narrative



Alejandro has



Dec 16

Celebrating
A YEAR OF
CONNECTION

+40,000
Website Visits

3,170 
LinkedIn Followers

1,125+
LinkedIn
Newsletter Subscribers

12,000+
Email
Newsletter Subscribers



I had the
opportunity to
attend the Future
of Fund
Management
Virtual
Conference —
and I have to say,
it's easily the
best conference
I've participated
in recently."

SARAH T.
Director of Donor Services





2025 CONFERENCES



FundMiner attended **25+** conferences through the year, engaging with

+10,000

nonprofit professionals nationwide

TOP 5 LIVE EVENTS OF THE YEAR

THE FUTURE OF FUND MANAGEMENT

VIRTUAL CONFERENCE



The Future of Fund Management

FundMiner's very own inaugural annual conference hosted 200 virtual attendees across every sector.

The Fund Management Masterclass



The Fund Management Masterclass

A 10-week, expert-led program designed to help teams build a best-in-class fund management program



UC RIVERSIDE

WEBINAR



Reimagining the Donor Experience with Intelligent Reporting.

A webinar featuring Ian Foster
(Director of Stewardship & Donor Relations at UC Riverside)



University of Nebraska
FOUNDATION

WEBINAR



The 5-Step Playbook to Fund Management Mastery.

A webinar featuring Aaron Rouse
(Director of Fund Stewardship & Management
at the University of Nebraska Foundation)



bwf

WEBINAR



Build it or Buy it? Choosing the Best Technology Strategy.

A webinar featuring Lori Stirling
(Senior Managing Vice President at BWF)

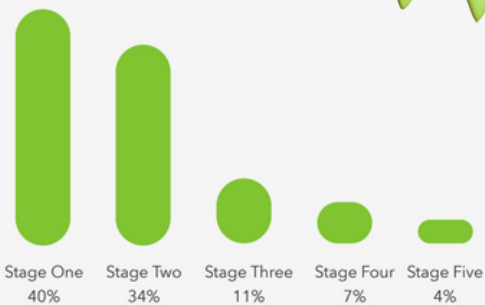
MOST DOWNLOADED RESOURCES OF 2025

1. Fund Management Maturity Model

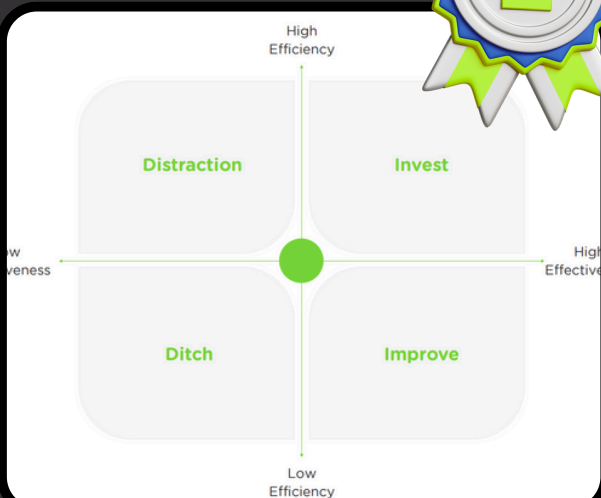
2. Mission to Metrics: A Primer in Advancement Operations KPIs

3. Global Fund Management & Stewardship Benchmarking Survey Report

Average Maturity Distribution



Data from 2025 Global Survey on Fund Management & Stewardship



TOP 5 BLOG POSTS OF THE YEAR

**Matching Mission to Money:
How Stewardship Shapes
Equity in Higher Ed**



**FundMiner and DRG Announce
Shared Services Partnership**

fm
FundMiner

DRG
DONOR RELATIONS GROUP

**Making the Case for a High-
Performance Operations Team**



**Take Your Fundraising
Operations From Future-
Proofing to Future-Design**

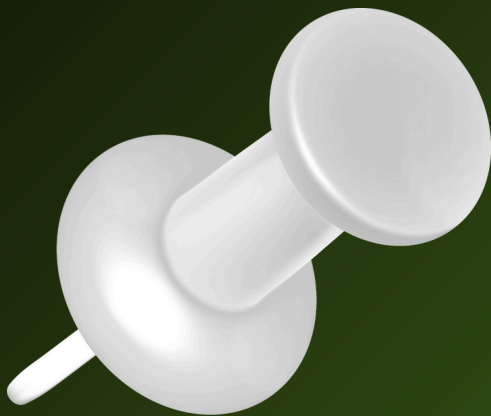


**What Motivates Healthcare
Donors to Give? A Deep Dive**





2025 PRODUCT HIGHLIGHTS



Historical Fields

Pin and retrieve historical data at the field level, supporting accurate reporting, audits, and year-over-year comparisons.

Introducing: Intelligent Reporting

Faster, more targeted, donor-facing reporting with enhanced layouts and clarity, supporting stronger stewardship experiences.



Total Active Requests
257
out of 257

Not Yet Submitted
20
out of 257

Approved
221
out of 257

Declined
16
out of 257



Narrative Requests Enhancements

Faster, centralized story collection with improved workflows for approvals, submissions, and follow-ups.

ANNOUNCING: THE DONOR PORTAL

Giving Summaries

Design once, deliver across
all your donors

Doc Hayward
GIVING SUMMARY 10/31/2025

Date	Amount	Type	Gift ID	Donor Name
10/17/2025	\$117.00	Pledge payment	12345	Doc Hayward
10/15/2025	\$1,030.00	Matching Gift	2855	Doc Hayward
10/1/2025	\$1,200.00	Pledge Payment	2957	Doc Hayward

Date	Amount	Type	Gift ID
10/17/2025	\$117.00	Pledge payment	12345
10/15/2025	\$1,030.00	Matching Gift	2855
10/1/2025	\$1,200.00	Pledge Payment	2957

Landing Pages

Personalized sites for
each of your donors.



Historical Fields

Labeled data creates
snapshots, enabling even
more reports.

ACME UNIVERSITY
Fund Name >>>
Endowment Market Value Summary
July 1, 2020 – July 30, 2024

Endowment Principal Fund	Market Value >>>
Endowment Market Value FY24	Market Value >>>
Endowment Market Value FY23	Market Value >>>
Endowment Market Value FY22	Market Value >>>

GROWING THROUGH PARTNERSHIPS

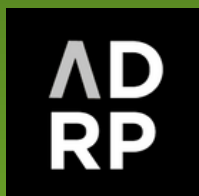
Thank you to our partners for a year of collaboration and meaningful work across the fund management ecosystem.



blackbaud®



Kindsight



aasp



THANK YOU FOR AN INCREDIBLE 2025!

Thank you for being
part of this year with us.

We're looking forward
to sharing more insights
and resources ahead.
Stay connected.