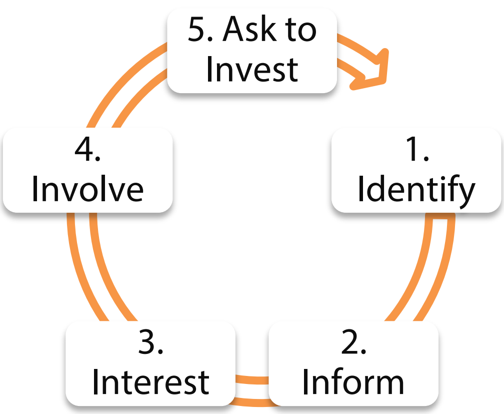
Gail Urquhart CONSULTING

What is Your Donor Engagement Model?



6. Steward the Relationship

- Formal recognition (Thanks +)
- Accountability for $ (The Donor's Gift at Work)
- Delight the Donor (Unique. Meaningful. Unexpected.)

Do what you said you'd do…and more!

REMEMBER: It's about the right person asking at the right time for the right project and the right amount.

SEVEN TYPES OF DONORS: Seek to understand what motivates your potential donor and build an engagement plan that speaks to those motivators.

1. **The Communitarian (doing good makes sense)**
2. **The Devout (doing good is God's will)**
3. **The Investor (doing good is good business)**
4. **The Socialite (doing good is fun)**
5. **The Altruist (doing good feels right)**
6. **The Repayer (doing good in return)**
7. **The Dynast (doing good is a family tradition)**
   (From: Prince & File, 1994, The Seven Faces of Philanthropy)

WHAT HAPPENS AT EACH STAGE:

1. IDENTIFICATION STAGE			
ACTIVITY	**ACTIONS**	**PURPOSE**	**WHO DOES WHAT?**
Prospect Identification	• Develop prospect list (database review, donor lists, input from volunteers, agency leaders, staff, community leaders asked for advice, public domain information)	To identify prospective donors in sufficient numbers and quality to achieve fundraising goal	Volunteers, agency leaders, community advisors provide names/info Development Staff produces and maintains list and does additional research Tool: Rated prospect list

Research	• Compile known information on prospect – giving history, interests, linkages to agency • Compile public domain information on linkage to cause, capacity to give, interest in giving, known influencers • Consider other relevant info: understanding of prospect's capacity; life interests; peers, motivators, influencers, friends, mentors and peers	To provide solid base of information to assess prospective donor's linkage to cause, ability to give, and interest in giving to a particular area	Development Staff does research, supplemented by knowledge provided by volunteers and others Tool: Research profile (Consider when it becomes appropriate to invest in prospect research database – Gail can provide info)
Qualification	• Consider research and volunteer info to assess giving capacity, state of readiness, best approach, timing, etc • Following initial assessment, conduct regular prospect qualification activity to remain current •	To determine, based on research, the most likely range and likelihood of giving for the prospect in order to create an appropriate prospect engagement plan.	Development Staff qualifies the prospect, with input and insights from volunteers based on relationship *Tools: Rated prospect list, evaluation form/exercise with volunteers where applicable*
Prospect Clearance	• Determine most appropriate 'asker(s)' & timeline based on research and evaluation process • Following initial list assessment, conduct regular prospect clearance activity as needed	To coordinate asks and assemble best team to meet with prospective donor. This is particularly important in multi-fundraising staff development offices.	Development Staff conducts prospect assignment meeting, with input on relationships from volunteers and agency leaders
Strategy Development	• Determine and record proposed actions, timelines, prospect qualification information, and volunteers/staff identified for building relationship	To establish a strategy, or cultivation, plan to activate and monitor prospective donor's engagement This planning piece gets continuously updated as more information is discovered and strategy is refined	Development Staff produces and maintains current strategy documents and status list (ideally managed on and generated from database) *Tools: Strategy plan (or cultivation plan)*

2. INFORMATION STAGE			
ACTIVITY	ACTIONS	PURPOSE	WHO DOES WHAT?
Initial Agency Information	• Once contact made, introduce to agency through newsletter, invitations, report to community etc (with permission)	To introduce prospect to agency's work and impact	Fund Development staff coordinates. Depending on relationship/potential of prospect, coordinate personalization by CEO and/or volunteer
Initial Engagement	• Face to face discovery call with prospect	To introduce prospect to the vision and to gain understanding of prospect's response to vision and case as well as their interests/level of engagement/potential barriers	"Best" Team based on relationships, expectations of prospect Development Staff does all prep and takes notes when volunteer or agency CEO is leading call – relevant info and actions captured on database *Tools*: briefing note (incl script), collateral material, contact report post-call
Ongoing Information	• Provide appropriate follow-up communications/opportunities to prospective donor – written information, face to face meetings, interface with agency experts, tours, events, updates on vision/case development, etc	To expose prospect to vision/case and grow interest/engagement To gain understanding of specific areas of interest within case for support through conversation	As above Development Staff driving activity

3. INTEREST STAGE			
ACTIVITY	ACTIONS	PURPOSE	WHO
A Specific Area of Potential Engagement Identified	• Create opportunities for fostering interest in specific projects – interface with experts, tours, events, information meetings	To grow interest and prospect's understanding of investment opportunities and what will be achieved through their involvement	As above, with particular engagement of experts at this stage

4. INVOLVEMENT STAGE			
ACTIVITY	**ACTIONS**	**PURPOSE**	**WHO**
Personal Engagement Interest Identified	• Where appropriate, create opportunities for prospect's active involvement in their chosen area of interest through Committee, Board, Advisory Council involvement • *Tools*: briefing notes, proposals	To establish vested interest of prospect and gain ongoing benefit from their contributions of their expertise, circle of influence, etc This phase sometimes is more appropriately phases "after" giving creates a sense of caring or belonging with respect to agency's mission. Conversely, it can sometimes create the desire to give.	Typically Volunteers and Agency Leaders engage prospect in this level of involvement Development Staff provides any necessary support

5. INVESTMENT STAGE			
ACTIVITY	**ACTIONS**	**PURPOSE**	**WHO**
Prospect is Engaged	• Prospect asked to make a gift	To advance agency vision through giving	Best 'asker' based on knowledge gained - Volunteer/Staff CEO/Staff Staff Development Staff provide support/followup *Tools:* Briefing note for face to face ask (scripted), written proposal where needed, post meeting contact notes

STEWARDSHIP:

Good donor stewardship delivers on the following five areas. It is staff-driven but appropriately engages senior leaders and volunteers at the thanking, recognizing and reporting back stages. Senior leaders and volunteers should also be involved, where appropriate, in providing 'experience inventory' touch points with key donors.

Donation Acceptance and Management - receipt and use of donations for the purpose intended, and in keeping with agency policies and regulatory requirements. STAFF DRIVEN

Donor Thanks/Acknowledgement – timely and appropriate thanking of donors for their contributions. STAFF DRIVEN BUT ENGAGE SENIOR LEADERS AND VOLUNTEERS APPROPRIATELY BASED ON RELATIONSHIP

Donor Recognition & Other Stewardship – meaningful, appropriate and sustainable donor recognition and stewardship to recognize and celebrate philanthropic support and the partnership created. STAFF DRIVEN BUT ENGAGE SENIOR LEADERS AND VOLUNTEERS APPROPRIATELY BASED ON RELATIONSHIP. SEE EXPERIENCE INVENTORY.

Donor Reporting & Communications - timely and relevant communication with donors and the public about the use of donated funds as well as the accountability and effectiveness of your agency as a charitable organization. STAFF DRIVEN BUT ENGAGE SENIOR LEADERS AND VOLUNTEERS APPROPRIATELY BASED ON RELATIONSHIP.

Donor Development & Public Trust – measurement of engagement, retention and growth of donor participation. Demonstration of public transparency, accountability and best practice. STAFF DRIVEN, LEADERSHIP AND BOARD RESPONSIBILITY.

Based on what you know or are learning about your prospect, what could you create for them to experience that would build their connection to your cause? Who should they meet? How should their interaction with your organization make them feel?

Build an 'experience inventory':

- tours
- events
- receptions
- behind-the-scenes opportunities

- opportunities to do something cool related to your agency's work
- opportunity to meet beneficiaries of your agency and hear their stories
- advance/inside track information your agency, it's work or your sector
- opportunity to advise/offer opinion
- newsletters
- news clippings that might be of interest
- one of a kind – what do you have to offer that no one else can?

THINK OF DONOR ENGAGEMENT AS A CONTINUING LOOP:

It starts with Research... discovering what your donor cares about.