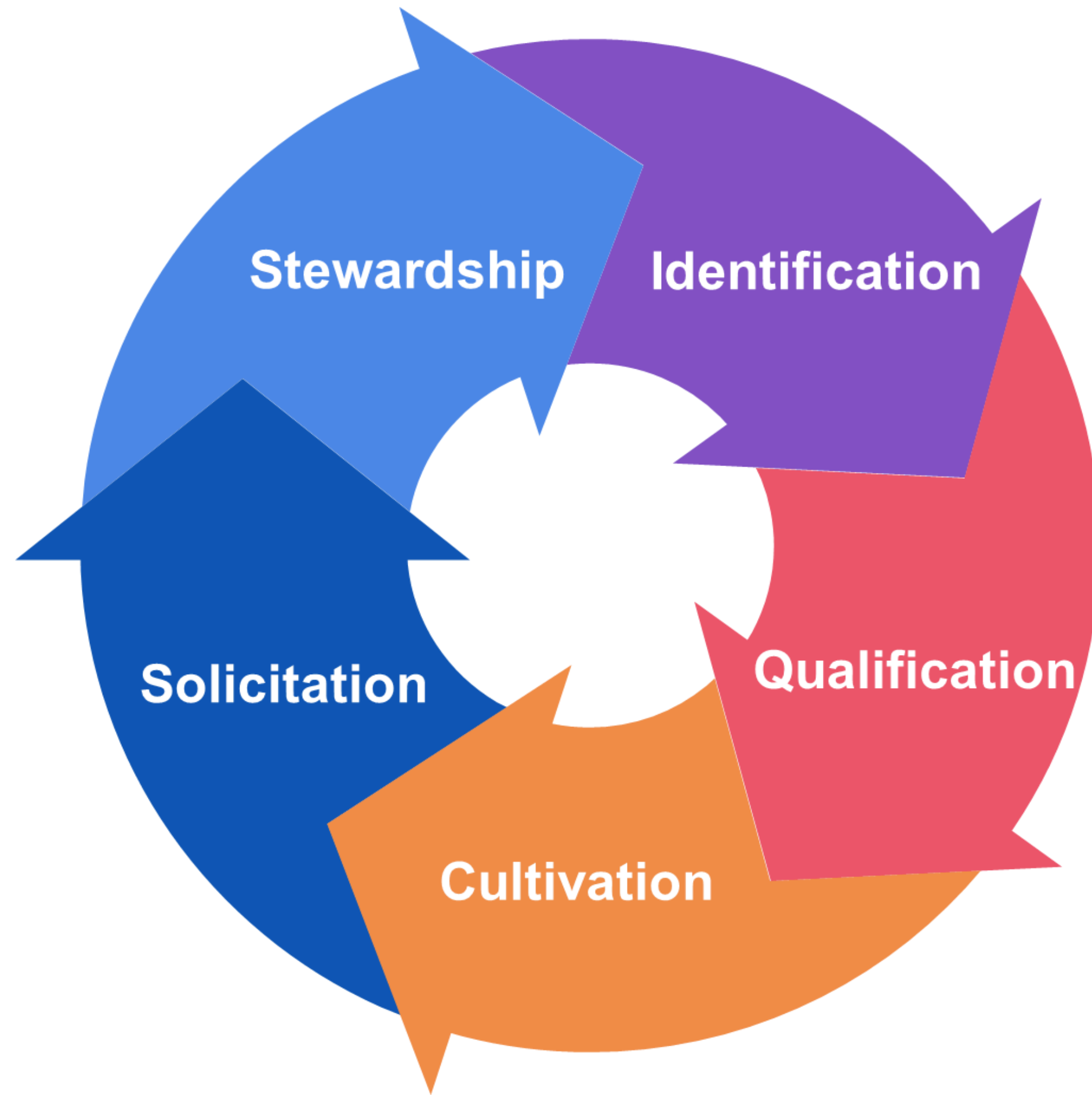


The Donor Cycle: How to Raise Significant Funds for Your Organization

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THE DONOR CYCLE

Donor Profile: Foundation

Basic information

Name, website
Date of update

Programmatic Priorities

Which thematic
areas they support

What are the
issues they are
most interested in

Application Process

Templates,
submission
deadlines,
information required

History of giving

To whom they give, how
they give, how much, for
how long.

People & contact details

From sectoral officers
to leadership

Other important & useful information

Press clippings, significant
achievements, strategic
partnerships...

Donor Profile: HNWI

Basic information

Photo, name, profession
LinkedIn profile link
Date of update

Business activity & indications of wealth

Related
businesses & their
financial
performance

Other assets

Hobbies & loved topics

Social activity

Expressed opinions
about social issues

Things he/she is
passionate about

History of giving

To whom they give, how
they give, how much...

Link with the organization

People & contact details

PA, close partners, all we
can find

Family information

Press clippings, significant
achievements, strategic
partnerships...

Prioritizing your donors

Linkage

- 0 = no record of giving or no contact with donor
- 1 = pledge but no gift, or one time gift, or memorial gifts
- 2 = lapsed donor or occasional donor
- 3 = frequent donor—annually
- 4 = frequent or current major gift donor

Interest

- 0 = no interest or knowledge or minimal knowledge
- 1 = minimal involvement in a charity-related activity
- 2 = intermediate interest/knowledge/involved with the charity in some way
- 3 = senior volunteer connection or member related committee
- 4 = actively involved in the charity, volunteer

Ability

- 0 = \$1 to \$ 2,400
- 1 = \$2,500 to \$ 9,999
- 2 = \$10,000 to \$ 24,999
- 3 = \$25,000 to \$ 49,000
- 4 = \$50,000 to \$ 99,999

**Max.
points
12**

Meeting briefing

What kind of meeting if this?	
Date	
Location	
Participants	
Goal of the meeting	
Talking points	
Short donor history	
Roles in the meeting	
Agenda	
Next steps (suggested)	

Short meeting report

Date	
Location	
Participants	
Materials	
Key points of the discussion	
Pay attention to	
Next steps agreed	

Donor stewardship matrix

	Communication type	Timeline	New donors	Loyal donors	Major donors	Planned giving donors
Acknowledgment	Thank you email or call	Within 24 hours	✓	✓	✓	✓
	Thank you call from director	Within 48 hours			✓	
	Welcome letter	First week	✓			
Recognition	Annual donor lunch invite	Annually		✓	✓	✓
	Annual report listing	Annually			✓	✓
	Legacy society invitation	First month				✓
	Donor highlight in newsletter	Annually			✓	
Reporting	Video update of impact	Quarterly	✓	✓	✓	✓
	Impact report	Quarterly	✓	✓	✓	✓
	Update on gift use	Twice a year			✓	
Ongoing engagement	Volunteer opportunity	Quarterly	✓	✓	✓	✓
	Donor survey	Quarterly	✓	✓	✓	✓
	Holiday cards	November	✓	✓	✓	✓
	Donor summaries for taxes	Annually	✓	✓	✓	✓
	Gala invitation	Annually			✓	✓
	Donor anniversary	Annually	✓	✓	✓	✓
	Donor stories	Quarterly	✓	✓	✓	✓

How to make a Stewardship Plan in 7 steps

THANK YOU

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