



## Donor Cultivation Guide

This Donor Cultivation Guide will assist your organization in developing a cultivation and engagement strategy with donors, including individual donors, corporate partners, and foundations, to achieve more sustained, long-term relationships.

### STEP 1: CURRENT STATE & VISION OF THE FUTURE

Establish and document near-term and long-term goals for donor cultivation.

### STEP 2: DONOR AUDIENCE SEGMENTATION

Establish criteria to identify your targets (individual donors, corporate partners/sponsors, foundations). Do your research and know your audience well, including their giving capacity and programmatic interest.

### STEP 3: COMMUNICATION CHANNELS

Consider the best communication channels to reach your audience, including online and offline.

**If you are using online channels**, amplify your message and reach with digital tools. Your website and social media channels are great places to do storytelling and showcase content to potential donors. Enhance your website with more opportunities for storytelling. Craft content for your social media channels customized to appeal to your target donor/partner audience. Create a content calendar for your social media channels. You could also consider tactics such as:

- Investigate options for social media listening (e.g., Salesforce Radian6, a platform that monitors and analyzes social media)
- Create a council of influencers: bloggers, media, influential executives at companies you are targeting
- Explore opportunities to get donated paid media from Twitter, Facebook, LinkedIn
- Broaden media/influencer list to include those covering the issues that matter to your organization

### STEP 4: ENGAGEMENT TOOLS

Develop talking points and collateral that your staff can use to engage with your target donor audiences.



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**Establish Value Proposition:** Define the unique value proposition of your organization or program. Understand and document what your organization brings to the table. Examples include an impressive brand, compelling statistics about organizational impact, stellar marketing materials, etc.

**Solidify Your Messaging:** Consider the positioning of your message to the target audience. For example, is it more compelling to note the donor will support the success of a specific program, or that they will directly support your beneficiaries (children, veterans, etc.)? Consider layering the message. Begin with high level stats to demonstrate impact, then layer personal stories and testimonies for the specific audience.

**Summarize the Benefits:** Communicate the benefit of engagement for this particular audience, such as, the type of recognition they will get or the networking opportunities available. Develop the “what’s in it for me” pitch, outlining to the target audience what benefit they receive from engaging/donating.

**Develop Outreach Materials:** Develop the necessary marketing materials. These include a summary document, a “Dear donor/partner” letter, aggregate impact reports, and/or success stories. Tailor these for your individual conversations.

### Step 5: ENGAGEMENT PLAN

Different types of engagement will appeal to different audiences. Be clear on the ways you will invite them to engage. Offering multiple, clear, options increase opportunities for engagement.

**Be clear on the expectations** (monetary, advocacy support, networking, etc.). Include specificity and transparency around the impact that monetary donations and in-kind donations will create.

- **Plan for in-person meetings:** Hold 30 minute in-person meetings. Be sure you are maximizing your time with the potential donor/sponsor/partner. Focus on three key messages targeted for this audience. Explore what would compel the person to participate. Explore what parts of the organization/program are most important to the specific individual/organization.

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- **Plan events:** Consider hosting events such as luncheons, open houses, wine tastings, documentary viewings, etc. to engage larger groups at once. Keep in mind the capacity needed to organize larger events – smaller scale may be beneficial, given they are less resource intensive and can be more fun and personal. Consider bringing a tablet or other mobile technology to all events. Investigate using a donor-based client relationship management (CRM) software as a means of donor engagement and as a payment method at events.

### Step 6: RESOURCES NEEDED

Consider, and plan for, the resources needed to engage the target donor audience. These resources include: human resources, financial resources, and the tools & systems you will use to reach these audiences.

### Step 7: IMPLEMENTATION ROADMAP

Map out your plan to engage your different target audiences and track the outcomes.

Consider documenting:

- Target Audience
- Activity/Communication
- Dissemination
- Lead/Support
- Target Date or Frequency
- Outcome