

Hello, I'm Kiana



Introducing Britt



How to Manage a Framework for Successful Donor Journeys

A strategic approach to creating authentic engagement and valuable lifelong giving relationships



The process:

1. Ideation: Brainstorm possible touchpoints
2. Data: Asses the information you own
3. Longlist: Look for affinity signals in prospect data
4. Qualification: Review based on positive/negative factors
5. Segments: Organise into most viable tiers
6. Mapping: Match touchpoints with tiers
7. Key takeaways



Connection

“

The energy that exists between people when they feel seen, heard, and valued; when they can give and receive without judgement; and when they derive sustenance and strength from the relationship

”

- DR BRENÉ BROWN, THE GIFTS OF IMPERFECTION

Campaigns

Ensure your campaigns are well-defined and clear and compelling.



Activity 1: Brainstorm session to create your unique list of Engagement Options

1. List every activity you can think of that you currently offer that could potentially become a touchpoint for someone
2. List activities you plan to offer in the future
3. Group and categorise the activities
4. With your team, discuss each activity in depth, and record what works well, what doesn't, how to fix that and which groups might be interested
5. Revisit this from time to time to add to it as and when



Example Engagement Options

Opportunity Type	Example Opportunity	What Works Well	What Doesn't Work Well?	How can we improve?	Who is this likely to Appeal to?
Background Activity	Digital Holiday Card	Inexpensive but effective	Some potential donors prefer a hard copy card	Identify those VIPs to receive a hard copy card & create new opportunity type	All
Specialist Activity	Chaplain's Prayer Breakfast	A list of known religious individuals is held by the Chaplain who knows them well	Not well-advertised to newcomers	Help Chaplain with social media presence	Current Parents, Staff, Governors
Events	Networking Social	Specific industries networking approach	Younger attendees not forthcoming, expensive	Work with key personalities to drive better attendance levels, look for sponsorship	Mentors, OS, Current Parents
Personal Comms	Invite someone to take part in "Stortfordian Stories"	Takeup is excellent, people flattered to be asked	Ensuring good readership	Maximise social media, share in multiple channels	OS potential major donors
VIP	Meeting with the Head	Takeup is excellent	Head is very busy, cannot use this frequently	Ensure that Head is only involved sparingly and when she adds value	OS, Current Parents

Activity 2: Prepare data & research prospects

Great data is crucial.

Gather it however you can and invest in a system that helps you to organise and maintain it effectively.

Basic data

- Dates & Houses
- Interests while at school & now or child's interests
- Wealth surveys
- Giving history
- University, sector & career path
- Personal knowledge gained through conversation
- Affinity if known
- Events attended

Activity 3: Create Your Prospective Donor Longlist

Gather all the data you have on individuals and create a simple spreadsheet to organise them.

The starting point list was compiled by using consultant's longlists, recent donors, regular givers, prepaid fees parents, fee remission donors, wealth surveys, ambassadors, and legators.

Fill in anecdotal information and socialise appropriately with senior leadership at the School who may have insight, especially with current and newly former parents. Flesh out each profile as much as you can.

Id Number	Active/Offline Profile	Name
Age	Location	Constituent Groups
Draft Tier	Draft Donor Capability Level	History of Giving
Current Affinity	Why are they on the list?	Regular giver?
Legator?		Comments

Prospective Donor Qualification Methodology

+

Active profiles are
prioritised over
offline

Regular givers

Major donors in the
recent past

Parents whose
children are thriving

Past event
attendance

Local addresses

Social media
connections

Perceived warmth

Legators

Volunteers

Prospective Donor Qualification Methodology

-

Donated only in the distant past

Property Wealth survey individuals without other interaction

Current Staff and Spouses

Former Parents whose child went to 6th form elsewhere

Parents whose children are not thriving

Anyone under 30 has been removed from the list unless reason exists

Negative relations with the school leadership - "difficult"

Reputational risk

Low perceived affinity

VIP individuals- privacy

Non-existent relationship with the school

Have expressed distaste with fundraising

Requests of no contact from the school

Activity 4: Agree Your Specific Donor Tiers

Setting well-thought through Donor Tiers is crucial for ensuring adequate focus on the right individuals, allowing for movement and flexibility.

Tier 1 Donor Prospects

- Circa 20 Individuals
- Stewarded personally by Head, Development Director and other Senior Leaders
- Major Donor focus

Tier 2 Donor Prospects

- Circa 30 Individuals
- Stewarded by the Development Director
- Major Donor Focus

Tier 3 Donor Prospects

- Next 50 Individuals
- Stewarded by the Team with oversight from the Development Director
- May be Major Donors or Mid-Level Donors

Tier 4 Donor Prospects

- Everyone else on our radar

Activity 5: Map Your Tiers and Activities

Cross reference the individuals you placed in each tier and your available activities to create unique journey options for each donor.

Track and manage each donor through the process, ideally with a system which will record activities and prompt your next move.

Individuals may move up and down the tiers but stewardship should be eternal.

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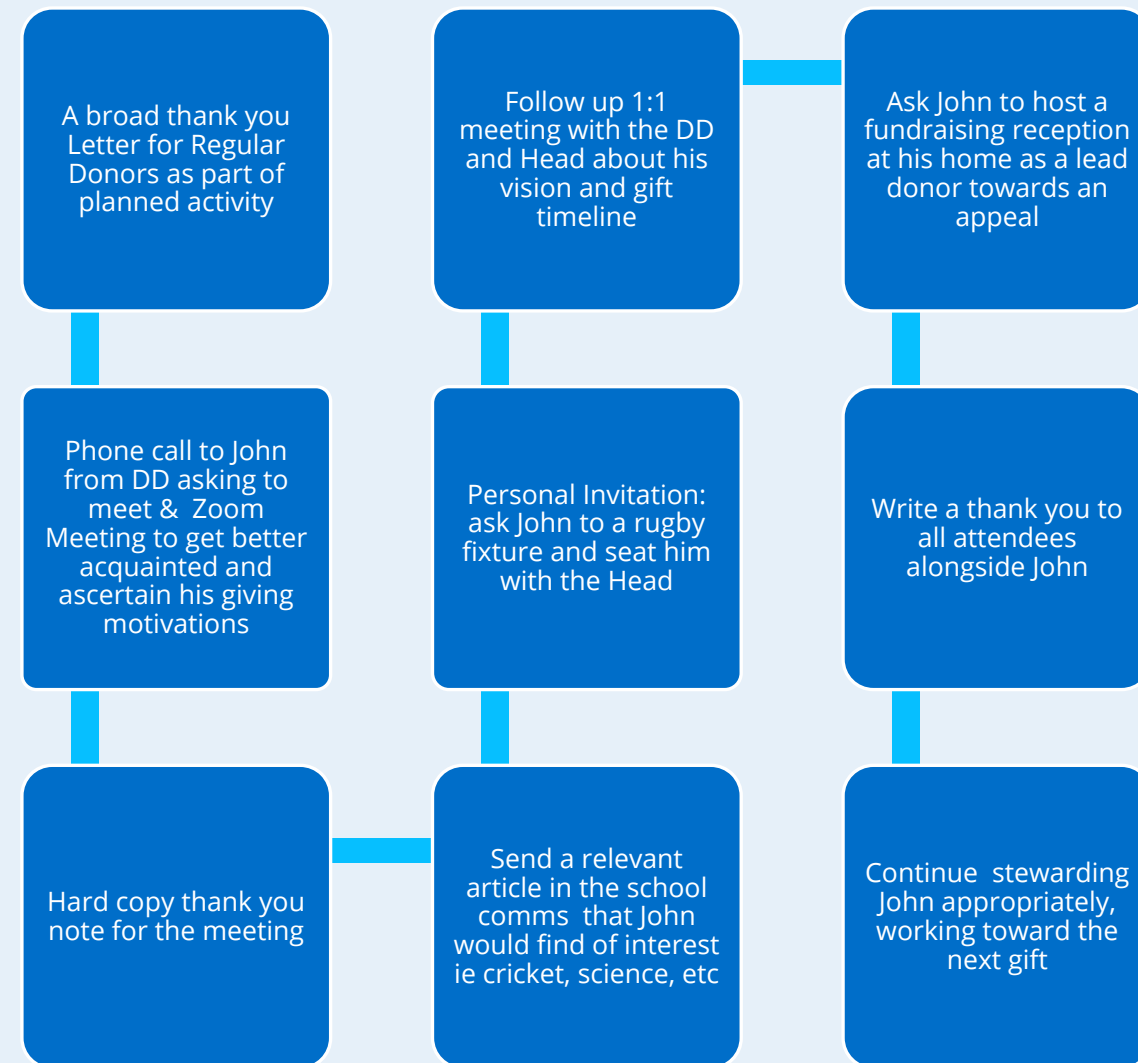
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Case Study: Donor Pathways

PROSPECT DONOR PROFILE- WHAT WE KNOW ABOUT THIS INDIVIDUAL AT THE START

John is an OS. He is a retired doctor who has moved back to the local area recently. He reconnected with the school 5 years ago and became a donor, giving £100 monthly towards bursaries after a soft ask at a reunion gathering. While at school, he was academic and was on the Cricket team. In addition to his interest in cricket, he now follows rugby and is a member of the local rugby club socially, according to the College's Head of Rugby. He is divorced with no children and lives in a home that is valued at over £1m where he enjoys entertaining his rugby friends.

PERSONAL, AUTHENTIC ENGAGEMENT



Case Study: Donor Pathways

PROSPECT DONOR PROFILE- WHAT WE KNOW ABOUT THIS INDIVIDUAL AT THE START

Jane is a current parent whose daughter recently joined the Prep school on a music scholarship. Jane responded to an appeal for scholarship donations, committing the prize back to the school for bursaries. Jane works as a solicitor in London, and is married to Jim, a small business owner in the local area. Staff feedback indicates that Jane and her husband are friendly parents who are invested in their daughter's education and musical talent, and that their daughter is thriving at the College.

PERSONAL, AUTHENTIC ENGAGEMENT



Case Study: Donor Pathways

PROSPECT DONOR PROFILE- WHAT WE KNOW ABOUT THIS INDIVIDUAL AT THE START

Philip is an OS in his 50s who now lives in California. He hasn't been in touch since leaving in the 1980s and was previously 'lost' to us. He finds and joins the Stortfordian Foundation portal and makes a small £50 donation to a capital project. Research indicates that he is now a successful architect and involved in philanthropy in the USA.

PERSONAL, AUTHENTIC ENGAGEMENT



Strategic Donor Cultivation

In the context of strategic fundraising, how can we create authentic journeys that are bespoke to individuals, and yet measurable and manageable from a professional perspective?

Be Adaptable and know your audience

- Don't expect to be able to see the outcome from the starting line and be flexible as you move the relationship along
- Timelines aren't prescriptive, and donor relationships are fragile.

Be Genuine

- See the person instead of a target to be met; really do your research properly before you meet with someone
- Don't assume you know what their philanthropic motivations are, find them out. By helping them to articulate, you can help them achieve their vision by committing the funds.
- Be discreet, don't discuss potential giving with other potential donors or staff members who are not involved in the stewardship process
- Spending the right amount of time – if you are asking open questions and matching opportunities to the information they are giving you, the ask becomes more natural...

Be Specific

- When making an 'ask', talk about vision, impact, and timelines

Be willing to stand down

- Know when and how to step away or to bring someone else in
- Deprioritise but don't drop people completely unless that is their wish

Thanking – in creative ways!

Thank you

Any questions?



About ToucanTech

ToucanTech is an easy-to-use, adaptable and more efficient fundraising database and website software, built for schools.

Manage all of your advancement, alumni & admissions activity using a smart system that includes email, events, online payments, content publishing, mentoring, careers and more!



Any questions?

Contact Kiana

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