In this section, you will design your Donor Journey.

After learning about your potential donor audiences, you will identify the ones that best fit your organisation’s needs and ethos, and understand what motivates them to give.

Then, you will build a donor cultivation plan by designing your offering of benefits to tactically engage donors by leveraging your existing resources and assets.

Finally, you will learn how to develop your pitch to make an ‘ask’ to your donor.
Donor Audiences Overview

INTRODUCTION
To design your fundraising strategy, the first thing you need to decide is which donor audiences your organisation should fundraise from. Diversifying income sources is extremely important, as it makes you less reliant on a single type of donor. However, the decision over which types of donors you should cultivate must be taken very carefully. Ultimately, successful donor relationships depend on your capabilities, skills and access to networks, but also on the mission of your organisation and how well it aligns with your target audience.

The following pages will introduce five main types of high-value audiences. Each of them has specific characteristics you need to keep in mind before you start working on your engagement plan. Below is a quick comparison tool outlining the main features of each audience. The ones highlighted in green are what makes those audiences easier to engage with, the ones in red are less desirable features, and the ones in amber are somewhere in the middle.

- TRUSTS & FOUNDATIONS
- CORPORATES
- HIGH-NET-WORTH INDIVIDUALS
- GOVERNMENTS
- MULTILATERALS
<table>
<thead>
<tr>
<th>Audience</th>
<th>Giving Type</th>
<th>Speed</th>
<th>Relationship Expectations</th>
<th>Paperwork</th>
<th>Cultivation</th>
<th>Strategies</th>
<th>Influence</th>
</tr>
</thead>
<tbody>
<tr>
<td>Trusts &amp; Foundations</td>
<td>Often opt for a smaller, restricted ‘get-to-know-you’ grant, followed by opportunity for large, multi-year, flexible partnerships.</td>
<td>Can move faster than other audiences, but are not the fastest.</td>
<td>Often the most ‘low-maintenance’ of donor audiences, they tend to be straightforward.</td>
<td>Whilst reporting requirements vary, they usually look to evaluate the impact of their work, and in need of evidence and learning.</td>
<td>Do not require building relationships with several stakeholders.</td>
<td>Can invest in strategic ways, including early-stage ideas, systems approaches and leveraged giving.</td>
<td>Can be open to influence, especially from innovators.</td>
</tr>
<tr>
<td>Corporates</td>
<td>Cash giving is extremely limited compared to other philanthropic audiences; the best partnerships figure out how to use a company’s other assets, and target budgets that are not just CSR.</td>
<td>They can respond to asks quickly, especially the smaller, less international ones.</td>
<td>Notoriously ‘high-maintenance’ to manage and often require transactional benefits and experiences for their key stakeholders that are negotiated during the proposal process.</td>
<td>Usually do not require as lengthy proposals as other audiences.</td>
<td>Need engagement with various stakeholders at different levels (executive, senior and general staff).</td>
<td>Their giving trends are aligned with business interest.</td>
<td>Strong relationships can lead to influence over their business model and practice, and ultimately their social impact.</td>
</tr>
<tr>
<td>High-Net-Worth Individuals (HNWIs)</td>
<td>Often opt for a smaller, restricted ‘get-to-know-you’ grant, followed by opportunity for large, flexible partnerships.</td>
<td>Are the most responsive donors, as they are responsible for their own money.</td>
<td>Many want to be publicly recognised and offered exclusive experiences. It is advised to present a clear framework of opportunities to manage expectations.</td>
<td>Want to hear about your work through more informal means, and do not require lengthy reports.</td>
<td>Do not require building relationships with several stakeholders. Usually it is just one individual or family member.</td>
<td>Increasingly establishing formal philanthropic structures to strategically deploy funds.</td>
<td>Are keen on learning about your work, but are usually set in their ways of working. However, Next Gen are increasingly open to influence.</td>
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</table>
## Relationship-Based Fundraising, A Field Guide by I.G. Advisors

<table>
<thead>
<tr>
<th>AUDIENCE</th>
<th>GIVING TYPE</th>
<th>SPEED</th>
<th>RELATIONSHIP EXPECTATIONS</th>
<th>PAPERWORK</th>
<th>CULTIVATION</th>
<th>STRATEGIES</th>
<th>INFLUENCE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Governments</td>
<td>Tend to be large in value, but heavily restricted and time-bound.</td>
<td>Require onerous proposals and are quite slow and bureaucratic.</td>
<td>Tend to be straightforward and don’t have high stewardship expectations.</td>
<td>Often require lengthy and complicated reporting frameworks.</td>
<td>Require building relationships with multiple stakeholders at different decision-making levels.</td>
<td>Quite responsive to political or economic changes, in both positive and negative ways.</td>
<td>Are less likely to be open to influence.</td>
</tr>
<tr>
<td>Multilaterals</td>
<td>Often opt for a smaller, restricted 'get-to-know-you' grant, followed by opportunity for large, multi-year, flexible partnerships.</td>
<td>Require onerous proposals and are quite slow and bureaucratic</td>
<td>Tend to be straightforward and don’t have high stewardship expectations.</td>
<td>Often require lengthy and complicated reporting frameworks.</td>
<td>Require building relationships with multiple stakeholders at different decision-making levels.</td>
<td>Quite responsive to political or economic changes, and are accountable to member countries.</td>
<td>Are notoriously inflexible</td>
</tr>
</tbody>
</table>
WHO ARE THEY AND WHY SHOULD I CONSIDER THEM?

Trusts and Foundations are grant-making organisations. They usually have clear missions, relatively large funds and an obvious desire to create impact. In general, they are:

- **WEALTHY:** they have access to large cash budgets purely for grant making.
- **TRANSPARENT:** they are (mostly) clear about their funding priorities and upfront about what they expect from grantees.
- **AGILE:** they can move a lot faster than public funders, and tend to be more open to risk-taking and innovation.
- **INFLUENTIAL AND OPEN TO INFLUENCE:** having big foundation donors adds credibility, and a great relationship with them can lead to influence over their priorities.
- **DRIVEN:** they are keen on collaborating to achieve shared visions and discover the next big idea to solve issues.
- **REFLECTIVE:** they are often looking to evaluate the impact of their work, and in need of evidence and learning.
- **STRATEGIC:** they often invest in strategic ways, including early stage ideas, systems approaches and leveraged giving.

HOW DO I ENGAGE THEM?

Trusts & Foundations – and the people who run them – require a strong relationship-building approach. This field is competitive, and foundations can be idiosyncratic, so your organisation needs to stand out and fit with each donor’s needs and preferences. Your approach should include the following:

- **DO YOUR HOMEWORK:** carefully read their website to get a clear understanding of their funding criteria and impact objectives.
- **DEVELOP AND MAINTAIN RELATIONSHIPS:** reach out to potential foundation partners, and get to know them both as people and as an organisation.
- **SHARE A CLEAR VISION OF YOUR WORK:** clearly articulate your organisation’s vision and objectives for each programmatic area, focussing on the ones that the prospect may be interested in. Check out our Warm Up resources if you need help creating your vision and mission statement.
- **ARTICULATE THE NEED FOR FUNDING:** make sure your ‘ask’ is tied to specific objectives and programmes (they rarely fund operational costs).
- **FOCUS ON STRATEGIC ENGAGEMENT:** solicit their advice, seek to understand their plans and objectives, and invite them to events and strategic conversations.
- **PROMOTE YOUR ORGANISATION’S UNIQUE VALUE:** highlight your strengths and the benefits of having your organisation in their grant portfolio. Check out our Warm Up resources if you need help defining your organisation’s unique value.
- **PURSUE 'CO-CREATED' INVESTMENTS:** find common ground, and develop a plan to achieve shared missions, rather than asking for funds in a transactional way.
- **COLLABORATION:** engage in open communication, be approachable and transparent about impact and challenges.
WHO ARE THEY AND WHY SHOULD I CONSIDER THEM?
Corporates are businesses. They tend to look for multifaceted partnerships, where they can add value in several ways beyond cash donations. Generally speaking, these audiences tend to:

• **MAKE IN-KIND DONATIONS:** they are keen to add value in various ways, and may have resources to provide pro-bono support (e.g. products, services, skills transfer, employee volunteering, etc.).
• **PROVIDE INFRASTRUCTURE:** they may be open to using their existing business infrastructure and practice to benefit a partnership (e.g. marketing a product while raising the profile of a charitable partner).
• **BE INFLUENTIAL:** they add credibility and can help raise your profile. Conversely, if they have a bad reputation, you might not want to be associated with them.
• **BE INFLUENCED:** a very strong partnership with a corporate can lead to influence over their business model and practice, and ultimately their social impact.
• **HAVE VESTED INTERESTS:** their giving trends are aligned with business interest. They usually want to be associated with stakeholders who have a positive impact on their bottom line, or are addressing negative business externalities.
• **HAVE CONNECTIONS:** they can lead to connections with other types of private donors through their leadership and staff engagement.

MISCONCEPTIONS
Here are some of the most common misconceptions about corporates:

• **COMPANIES GIVE TO THE CAUSES THEY SAY THEY DO:** overwhelmingly, corporate initiatives come as a result of a personal connection. If there’s not a corporate foundation involved, their stated focus areas may just be a communications exercise.
• **GREAT CAUSES & STRONG IMPACT ARE ENOUGH:** companies are bombarded with requests for funds and partnership; everyone has a great cause that needs support.
• **COMPANIES CAN BE LARGE CASH DONORS:** cash giving from most companies is lower than you might think; the best partnerships figure out how to use a company’s other assets, and target budgets that are not just CSR.
• **COMPANIES CARE ABOUT SOCIAL IMPACT:** some do – but the best way to build a sustainable relationship is to think about the impacts on their business, too.

HOW DO I ENGAGE THEM?
Misconceptions aside, corporate partnerships can add a lot of value if managed correctly. The best corporate approaches have these key elements:

• **RELATIONSHIP-BUILDING:** engage with various stakeholders at different levels (executive, senior and general staff).
• **SHARED-VALUE:** asks should be tailored to their corporate mission and values, as well as any of the key challenges / ambitions explored in the cultivation stage, which may help them to meet their objectives.
• **ENGAGEMENT AND VALUE-ADD:** partnerships should engage staff and stakeholders wherever possible (e.g. use their networks, make their customers happy, help them be more efficient, engage their teams, use their expertise and meet their goals).
• **THINK LONGER-TERM:** corporate decision-making can be a complex process but, if done right, partnerships will likely be long-term.
• **CO-CREATION:** the most valuable corporate partnerships happen when there is co-creation and all parties have shared common objectives.
• **BENEFITS:** partnerships should be exclusive and bring benefits that are attractive to their leadership, as well as interesting for their wider staff teams.
• **STORYTELLING AND COMMS:** companies will want to tell the story of the partnership, as this has a benefit for their business. You will need well-written comms materials, impact statements and human-centred stories. Check out our section on Messaging (Section II, Part B) for some useful tips on how to talk about your story.
WHO ARE THEY AND WHY SHOULD I CONSIDER THEM?
High-Net-Worth Individuals (HNWIs) are individual people that hold significant financial assets, usually above $1 million USD (and Ultra-High-Net-Worth Individuals usually hold assets above $30 million USD). Essentially, they are wealthy people and require the strongest relationship-building skills. If well aligned, these partnerships can be extremely fruitful and rewarding. HNWIs are:

- **INVESTED:** they are usually passionate about a cause they support and willing to support you on a regular basis, but don’t always commit to multi-year gifts.
- **EAGER TO LEARN:** they are keen on learning about your work and the ways in which your organisation adds value.
- **FLEXIBLE:** they can be flexible with their giving, particularly if they trust your organisation and if there is open and honest communication.
- **RISK-TAKERS:** they are more likely to fund ‘risky’ causes and untested approaches, compared to institutional donors and corporates.
- **INFORMAL:** they often do not expect (nor wish to) receive lengthy impact reports, but rather want to hear about your work through more informal means.
- **STRATEGIC:** they are increasingly establishing formal philanthropic structures to strategically deploy funds (e.g. Foundations, Donor Advised Funds, Donor Circles, etc.)

HOW DO I ENGAGE THEM?
HNWIs need the strongest relationship-management skills. As it’s their personal wealth that they are giving away, everything about the fundraising needs to be personal, too. Successful HNWI relationships should:

- **TAKE TIME TO DEVELOP:** on average, it takes 12-18 months of engagement before you receive your first donation from a HNWI.
- **MAKE THEM FEEL VALUED:** thank them, recognise them, ask for their advice, and be ‘exclusive’ with the ones that give the most.
- **ASK FOR FEEDBACK:** they usually like to be engaged in strategic conversations, and like to provide feedback.
- **BE CLEAR ABOUT IMPACT:** they usually don’t require lengthy reports, but need to understand the impact you are achieving thanks to their support.
- **PROVIDE BENEFITS:** you should provide benefits and experiences of a calibre that is exciting and rewarding (which could closely align with benefits intended for foundations and corporates). Depending on the work that you do, these could include access to experts, field visits, meetings with key stakeholders, etc.
- **LEVERAGE MATCH FUNDING:** when possible, you should offer them match-giving opportunities. They will feel more compelled to support, as their contributions are adding more value.
- **OFFER TAX-EFFICIENT GIVING OPPORTUNITIES:** these are often extremely important to the personal wealth portfolios of HNWIs, so ensure you have a registration that can meet this need, if possible.
SPOTLIGHT: NEXT GEN DONORS

Next Generation (Next Gen) donors make up an increasingly growing share of this audience type. Whilst definitions differ, they are usually HNWIs between the age of 20 – 45. Next Gen donors stand out from traditional donors in several ways:

• IMPACT IS EVERYTHING: they focus much more on impact. They want it to be measured, and want to see it first-hand. Check out our Warm Up resources for some useful tips on how to measure and talk about impact.

• THOROUGHNESS: before committing to a gift, they usually want to learn more about your leadership and experts to feel confident about the expertise of your organisation.

• VALUES-DRIVEN: they support causes that match their personal values, and often want to bring their philanthropy into their personal life and relationships.

• COLLABORATIVE APPROACH: they are pushing the boundaries of traditional philanthropy with a stronger collaborative spirit and a greater use of co-funding mechanisms.

• BUSINESS APPROACH: more than previous generations, they bring business discipline and strategy to philanthropy.

• SUPPORT BEYOND FUNDING: it’s not only about writing a cheque, but also about how they can leverage their connections, expertise and access to support a cause.
WHO ARE THEY AND WHY SHOULD I CONSIDER THEM?
Grants made by governments are financial awards given by state departments, or local government authorities. Government funding is notoriously inflexible and involves heavy reporting and time-consuming relationships. However, they have the deepest pockets of all funder types. Generally speaking, bilateral funders are:

- **CREDIBLE**: they are a great source of credibility, networks, and mutually beneficial knowledge sharing.
- **POLITICAL**: they are quite responsive to political or economic changes, in both positive and negative ways.
- **INTERNATIONAL**: they often fund organisations and projects in foreign countries, and tend to have geographic priorities depending on their country history and political relations.
- **LARGE-SCALE**: they provide generous funding to address large-scale, regional challenges (e.g. agriculture, education, energy, housing, environmental conservation, etc.)
- **COMMITTED**: if there is political will within the current government, they will be committed to the cause and can disburse large quantities of funding.
- **DRIVEN**: they have internal and external pressure to ensure work is efficient, effective and the right choice.
- **OPAQUE**: they tend to be less upfront about their priorities and their needs, but can respond to proactive agenda-setting if it meets their objectives or makes their lives easier.
- **BUREAUCRATIC**: they require onerous proposals, reporting and detailed-focused accountability processes.
- **SLOW**: they can be slow in disbursing funds, but are usually clear about timelines.
- **RISK-averse**: being funded by taxes, governments answer to the general public, and are therefore quite risk-averse in their approach to giving.
- **KEEN TO SHARE**: they often have access to resources, knowledge and information, which they are keen to share with grantees.

HOW DO I ENGAGE THEM?
Engaging with governments for funding is, unsurprisingly, a deeply political exercise. Alongside having clear ‘asks’ and a vision they can get behind, it is also essential to focus on:

- **STRATEGIC ENGAGEMENT**: build relationships with multiple stakeholders at different decision-making levels.
- **ALIGNMENT**: highlight your unique value-add, and how it aligns with their goals and political agenda.
- **TRENDS**: be aware of giving trends and priorities to get your approach and timing right.
- **INTERNATIONAL FRAMEWORKS**: be aware of international frameworks (e.g. UN Sustainable Development Goals), and present your work accordingly.
- **TRANSPARENCY**: as they are notoriously inflexible, highlighting any challenges and changes in landscape in a timely and mindful manner is key.
- **ACCURACY**: make sure your reporting is compliant with their requirements.
WHO ARE THEY AND WHY SHOULD I CONSIDER THEM?
Multilateral funders are international organisations whose memberships are made up of member governments, who are also the primary source of funds. They hold large amounts of funding and operate in similar ways to Foundations, while also being relatively inflexible and bureaucratic. Generally speaking, these audiences are:

- **IMPACT-ORIENTED**: they have clear impact goals and, whilst there needs to be political will behind them, they are less influenced by members’ in-country politics.
- **BUREAUCRATIC AND SLOW**: they can be slow in disbursing funding, and bureaucratic in decision-making.
- **ACCOUNTABLE TO THEIR STAKEHOLDERS**: they are accountable to donors of their own, usually Governments or Foundations.
- **LESS RISK-averse**: compared to bilateral funders, Multilaterals are more willing to take ‘risky’ or political funding decisions, as they represent the international community.
- **DEMANDING**: they require lengthy proposals and very detailed reporting.

HOW DO I ENGAGE THEM?
Like Governments, engaging with Multilaterals is a deeply political exercise. The best approaches to Multilaterals have these key elements:

- **STRATEGIC ALIGNMENT**: as they are very driven by their own mission, make sure you communicate how your organisation will get them closer to achieving it.
- **INTERNATIONAL FRAMEWORKS**: be aware of international frameworks (e.g. UN Sustainable Development Goals), and present your work accordingly.
- **PROACTIVITY AND TRANSPARENCY**: share timely updates and reports, and highlight key challenges.
- **KNOWLEDGE-SHARING**: keep an open conversation and solicit their advice. They often have area-specific expertise that may inform your programmes.
- **STORYTELLING**: as they are constantly reporting to governments and donors, help them demonstrate their impact by sharing your success stories and framing your impact based on their priorities. Check out our Warm Up resources for some useful tips on how to measure and talk about impact.
INTRODUCTION

WHY DO DONORS GIVE MONEY?

This is a question that often gets ignored in routine fundraising. We sometimes assume that Governments, Foundations, Corporates and HNWIs simply have money, and so they should give it to good causes. However, when someone is sitting at their desk in one of these organisations, or looking at their own wealth as an individual, there are many different motivations that might drive them to give money away, and also many reasons they might choose not to.

As a fundraiser, it’s your job to advocate for the causes – and organisations – you work for, but it’s also your job to provide donors with the type of relationships and experiences that might make them want to start giving, and give more. This includes taking the time to focus on their journeys by asking yourself these questions: Why are they giving? What difference do they want to make in the world? How do they want to be seen? Is their giving a practical decision, an emotional one, or both? What are they fearful of, or excited about? And what challenges do they face in their giving?

All these questions are key to understanding each of your individual donors, as well as targeting your fundraising at specific types of donor audiences. You wouldn’t send an individual donor a 100 page technical report, nor expect a government official to make a grant after a private dinner with your CEO – and so you must know what drives your donors, and how you can balance giving them what they like whilst also meeting your organisation’s goals.

Donors are all different, but there will be at least one human making the final decision of whether and how much to give. This means understanding the varied motivations for giving is essential. Here are some of the most common reasons why donors decide to engage with non-profits:

- **IMPACT**: demonstrable value for money, and impact of their investment on a cause they support.
- **EXCLUSIVITY**: access to exclusive and unique opportunities, connections and experiences.
- **EXPERTISE**: access to cutting-edge information, innovation and unique insights.
- **CONNECTIONS**: socialising and connecting with peers, donors and experts.
- **INFLUENCE**: being involved in discussions, debates and – where appropriate – decisions.
- **ENGAGEMENT**: getting involved in an issue that matters to them, combining resources with others.
- **PROFILE RAISING**: allowing for personal positioning as a leader in the space.

This section provides several activities and tools you can use to understand your donors, prioritise which donor types you will focus on, make educated guesses at their motivations and even ask them to tell you directly what they want.
DEFINING YOUR DREAM DONOR

This is a simple exercise, ideally done as a group, bringing in people who work on fundraising, communications and programmes to get all perspectives.

OBJECTIVE
To articulate the specific qualities of your organisation’s ‘dream donors’, especially focusing on the elements outside of simple money that could add value to the organisation.

YOU WILL NEED
- A room (or a virtual meeting) in which to discuss as a group
- Post-It Notes, or scraps of paper
- A wall, whiteboard or digital whiteboard (e.g. Google Jamboard) to share and sort ideas

HOW TO RUN THE EXERCISE

STEP 1
Invite everyone to sit and think about their favourite donors (if relevant). Ask them to think about what was so good about them, what the donor brought to the relationship that made things better, and what were the key elements of the engagement that were good for them, their organisation and the cause.

STEP 2
Next, ask everyone to imagine their dream donor – the perfect donor for your organisation. Someone who gives exactly what is needed, is motivated to give by the right things, and works with you in a way that is right for your team and cause. What would the cultivation process be like? What would the partnership look like? What about them would be different to your typical donors?

STEP 3
Give everyone 5 minutes to write as many Post-Its as they can with the qualities of their favourite, and dream donors. One item per Post-It! Make sure these qualities are realistic, for example ‘able to give large grants quickly’ rather than ‘sends cash out of the blue’, and ‘able to give in our country’ rather than ‘ignores local legal restrictions’.

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**STEP 4**
Next, have everyone pick their top 3 Post-Its – the very best qualities they have experienced, or can imagine, in a donor, and share them with the group out loud, whilst adding them to the wall. If anyone has a similar suggestion, they should add it to the wall at the same time, so similar suggestions are grouped. Discuss any areas where there are disagreements on whether something would be good for the organisation.

**STEP 5**
Continue going around until everyone’s ideas are shared, grouped and discussed, and you have a wall full of the best donor qualities you can imagine.

**STEP 6**
Work together to sort these qualities in order from ‘Most Important’ to ‘Least Important’.

**STEP 7**
Summarise the top half ‘Most Important’ qualities as the key criteria you have in looking for the right donors for your organisation.

**STEP 8**
Have everyone reflect on which donors might meet this criteria, and encourage the team to seek them out!

**WHAT NEXT?**
You can make use of your ‘dream donor’ key criteria in many ways:
- Creating ‘donor personas’, and doing your donor prioritisation exercise (see next page).
- Having a ‘dream donor’ profile on your wall, to remind yourself of what you are looking for.
- Drafting a donor-friendly version of it and using it as a discussion piece when developing partnerships, perhaps even putting it on your website for donors to see.
CREATING DONOR PERSONAS

To understand the donors who are most likely to give to your organisation, and to inform best practice when building and managing relationships, we recommend creating ‘donor personas’.

WHAT IS A DONOR PERSONA?
Donor personas are detailed profiles of the typical donors you attract already, and also those you want to attract in the future. Typically, they address key facts that are relevant for you in tailoring your fundraising approaches, such as:

- Age, gender, relationship status
- Source of wealth, and any other stakeholders involved in decisions (e.g. family, their boss)
- Ways of engaging (e.g. going to events, giving with friends, reading reports)
- Views and values, including their connection to your cause, if they have one
- Personal interests
- Sources of information, including their news sources, and how they might learn about you (e.g. social media)
- Approach to giving, and motivations for doing so
- Assets other than money

WHY HAVE DONOR PERSONAS?
As a fundraiser, time is one of your most valuable assets, and often the scarcest. To ensure you spend your time on the opportunities that are most likely to lead to funding, you must focus your attention carefully.

Most organisations actually have quite a small pool of donors that fit their cause, geography, ethics and other criteria. If you don’t know how to spot those donors and aim carefully, you could end up wasting time trying to cultivate too many people, or the ‘wrong’ people, and you might develop fundraising ideas and approaches that won’t work for the donors in your network. Personas allow you to lessen these risks.

OBJECTIVE
To build the profiles of your organisation’s donor types. We recommend doing this as a workshop with your colleagues, but it can be done solo, too – the key is to allow time for creative thinking, brainstorming and prioritisation. If you are doing the exercise alone, you might want to share your completed personas with some colleagues for feedback and refinement afterwards – more brains are always better than one!

YOU WILL NEED
- A room (or a virtual meeting) in which to discuss as a group
- Post-It Notes, or scraps of paper
- A wall, whiteboard or digital whiteboard (e.g. Google Jamboard) to share and sort ideas
HOW TO RUN THE EXERCISE

STEP 1
Take some time to reflect on and discuss the qualities of a ‘dream donor’ from the previous exercise. If you haven’t already done that exercise, we recommend you start there to brainstorm together.

STEP 2
Invite everyone to write down all the types of donors your organisation has, one per Post-It. For example, you might have: Big Foundations, Government Aid, UN Agencies, Local Businesses, Wealthy Individuals. You could also break them down even more, if it makes sense for you, with examples such as: Health Foundations, Feminist Foundations, Religious Donors.

STEP 3
Place all Post-Its on the wall, or board, and sort them until you have no more than 10 categories. The fewer the better, but don’t leave out any important donor types.

Keep a note of these categories for the ‘Donor Prioritisation’ exercise later.

STEP 4
Next, split into pairs or small groups, each taking one of the categories, and one group taking the ‘dream donor’ category, too. If you don’t have enough people to take just one each, you can take more, just make sure you have enough time to spend on developing them!

STEP 5
In your pairs or small groups, spend time building-out a profile for your donor type. Use your imagination! Think of a person you’re creating (e.g. a grant officer in a Foundation), not the organisation itself (e.g. a Foundation), draw a simple picture of them, and discuss and write down things like:

1. Name
2. Age Range
3. Profession
4. Lifestyle (e.g. travel a lot, go to social events, stay home)
5. Hobbies
6. Family life (e.g. partnered, married, kids)
7. Their type of wealth (e.g. their employer’s, their family’s, self-made)
8. Their biggest concerns (e.g. spending wisely, achieving impact, meeting a goal, being known)
9. Feelings about your cause (e.g. sadness, pity, empathy, pride, hope)
10. Values about your cause (e.g. fairness, justice)
11. Giving history and approach (e.g. other organisations they give to, other causes, how much)
12. Cultivation preferences (e.g. coffees, events, reports & data)
13. How they find your organisation (e.g. from a friend, through an event)
14. What would concern them about your organisation
15. What they would love about your organisation
16. Sources of information, including their preferred news source
17. Assets other than money (e.g. fame, networks, property)

Below is an example of a ‘donor persona’ for a Next Gen donor.
STEP 6
Once your profiles are ready, present them to the rest of the group. Or, if you’ve been doing the exercise alone, share them with colleagues for their thoughts.

After each presentation, discuss whether any personas feel particularly wrong, or particularly right, when it comes to your current and future fundraising. Which of these fictional people do you feel like you already know? Which do you wish you could connect with? And which do you feel like you don’t know?

STEP 7
Once every persona has been presented, work together to shorten your total list of personas down to five. You can do this by combining some (for example, grants officers in big Foundations, and programme officers in UN Agencies are sometimes similar), or deciding which types you do or don’t want to spend your time on in the near future. Make sure one of the final five is your Dream Donor!

It is also helpful to prioritise the list based on ensuring a range of qualities that most impact your fundraising approach. For example:

WANTS PROPOSALS
- Jane, Grants Officer, Big Foundation
- George, Programme Officer, UN Agency

WANTS MEETINGS
- Anna, Board Member, Family foundation
- Yousef, Local Business Owner

WANTS EVENTS
- Fatima, Local Philanthropist, Self-Made
STEP 8
Draft final profiles for each of your five donor personas. Make them detailed and visually engaging, good enough to put on your wall, and share with new team members internally. These are your finished Donor Personas!

WHAT NEXT?
Donor persona profiles should be used to support you to:

- Segment your donor pipeline into categories, so you can know at a glance which donor types dominate your existing database, which ones you have most success with, and which ones you need to focus on further.

- Understand potential donors, thinking ‘is this person more of an Anna, or a George?’ when planning how to approach them, and meet their needs.

- Prioritise and streamline your fundraising work by developing and testing new approaches and ideas for engaging your donors against a limited number of types (so you don’t try to please everyone!)

- Ensure new programme developments are effectively translated with a specific set of target donors in mind – e.g. why develop a 20 page technical report if none of your main donor audiences want that?

Some organisations even have a physical representation of their donor personas in meetings with them, such as a photo or a toy, so they can remind themselves to ask ‘what would Anna say?’ or ‘what would Yousef want?’ Others invite specific team members to represent each persona, for example someone might be asked to always ‘think like Anna’ when proofreading a donor communication.

We recommend you update them once every 1-2 years.
DONOR PRIORITISATION

This is a simple exercise to help you prioritise your pipeline and portfolio. As mentioned in the Donor Personas’ exercise, every fundraiser has limited time, and should aim to focus it on the donors who are most likely to give funding, and be good partners for the work. This tool, when used, can help to make prioritisation simple and clear.

HOW TO RUN THE EXERCISE

This activity is more of a desk-based piece of work, although you can do it as a group if you prefer.

STEP 1
Begin with the Donor Prioritisation Tool below, or recreate it in a simple spreadsheet. Add your current list of donor types, plus your dream donor type if they’re not already on there.

STEP 2
Along the top of the table, add in your essential donor criteria created during your Dream Donor exercise.

The tool already has three essential criteria included, based on our experience:

• **EXISTING MARKET**: do donors of this kind, funding work like yours, already exist?
• **EXISTING CONNECTIONS**: does your organisation have existing relationships with, or a way to use your network to reach out to, donors of this kind?
• **EXISTING RESOURCES**: does your organisation have the resources or the potential (e.g. language, offering, capacity) to cultivate relationships with this donor type?

STEP 3
Assign each set of criteria a maximum number of points, based on how strategically essential it is.

For example:

• Something like ‘able to give money in our country’ would be essential, and should have a maximum of 10 points.
• Something like, ‘able to make introductions’ might just be nice to have, and so would have a maximum of 5 points.

OBJECTIVE

To create a prioritised list of donor types, for internal use, to articulate which donors you will focus your time on, and which are not a good return on investment for your organisation right now.

YOU WILL NEED

• The results of your ‘Dream Donor’ and ‘Donor Personas’ activities
• A computer with a programme that allows you to make data tables, such as Excel
**STEP 4**
Give each donor a score for each category, where the highest score means they perfectly meet that criteria, and the lowest score means they don’t meet it at all.

**STEP 5**
Add up the points in each row, and sort the list from highest to lowest. The donors at the top of the list should be your highest priority.

**WHAT NEXT?**
We recommend focussing your fundraising strategy, and time, on the top 3-5 donor types on this list. This doesn’t mean you should ignore other donors if they come to you, but it will enable you to focus your outreach and cultivation time on the most important ones, and arrange your activities around them.

Other uses for this list include:
- Deciding whether a new fundraising idea (e.g. an event, or programme) is worth spending time and money on, to reach your priority donor groups.
- Assessing new donor types against existing ones, to see whether they should be prioritised over them.
- Communicating with Board members and leadership on why certain opportunities are prioritised over others (and working with them to decide these).
# Donor Prioritisation Tool

<table>
<thead>
<tr>
<th>Donor Type</th>
<th>Donor Sub-Type</th>
<th>Persona(s)</th>
<th>Existing Market</th>
<th>Existing Connections</th>
<th>Existing Resources</th>
<th>Criteria 1</th>
<th>Criteria 2</th>
<th>Criteria 3</th>
<th>Criteria 4</th>
<th>Criteria 5</th>
<th>Total Points</th>
</tr>
</thead>
<tbody>
<tr>
<td>Foundation</td>
<td>Small Family</td>
<td>Jane, Grants Officer and Anna, Board Member</td>
<td>7</td>
<td>5</td>
<td>5</td>
<td>6</td>
<td>5</td>
<td>2</td>
<td>1</td>
<td>0</td>
<td>31 / 60</td>
</tr>
</tbody>
</table>
EXAMPLE INTERVIEW GUIDE

It might sound unusual to interview your donors, but it can often be a great way to engage them with what you are doing, as well as test your assumptions about your Donor Personas and what they like.

HOW TO SET-UP AN INTERVIEW

If you have known your donors for a while, you can invite them to contribute to a process of ‘improving your partnership practices,’ and if you’re new to your organisation you could say you’re reaching out to the organisation’s most important supporters to learn more about their approaches to giving. Either way, donors often feel really valued and flattered by being interviewed, and feel a sense of ownership over the way you work together for the future. If you don’t feel able to do the interviews yourself, you could bring in an external consultant or contractor to do them for you.

OBJECTIVE

To solicit frank and honest feedback on your fundraising practices, and ideas, as well as deepen your relationships with your donors.

EXAMPLE INTERVIEW GUIDE

You should adapt these questions to suit your specific organisation, but we have found the following focus areas to yield the best results when interviewing donors. We do not recommend more than 20 questions for a 1-hour conversation.

SECTION 1: YOUR (ORGANISATION’S) PHILANTHROPY

• What is your experience of philanthropy? And our sector specifically?
• What causes do you support, with what (time, money, skills), and why?
• When donating to an organisation, do you restrict your giving? If so, how?
• Other than impact, what are the elements of a great non-profit relationship for you? What do you look for from your partnerships (emotionally, practically, socially)?
• From your perspective, are there new or unexpected changes or trends in funding for our sector?

SECTION 2: OUR ORGANISATION

• How would you describe your involvement with our work?
• If your own words, what does our organisation do?
• We describe ourselves as “[Insert mission statement]”, what would you say the unique value of an organisation like ours might be?
• What organisations do you think are most similar to us?
• Which organisations would you point to as an example of best practice in our sector, and why?
SECTION 3: FUNDRAISING & MESSAGING

- What aspects of our work do you find most appealing and why?
- How have you found the experience of being a supporter of ours?
- Have you been happy with the level of contact, information and engagement?
- What are the common mistakes organisations like ours make when engaging with donors like you?
- Is there anything that would stop you supporting us in the future?
- From the below list of options, if you had to pick only one for a hypothetical grant, which would you pick and why?
  - Unrestricted Funding (e.g. to support the organisation’s overall mission)
  - [List Priority Future Programmes]
- Of those, which is the least attractive option and why?
- Do you feel there are any gaps, or unnecessary focus areas, in our work?
- What do you see as our key strengths when it comes to fundraising?
- What do you see as the biggest barriers to fundraising for our organisation?
- What, in your experience, is important for organisations like ours to do to stand out in the sector?
- If you worked for our organisation, which donor (person or organisation) would be Priority Number One for you to speak with?

SPOTLIGHT: ASHOKA’S DONOR-CENTRED APPROACH

Ashoka is a global fellowship programme which supports the world’s leading social entrepreneurs solving deep-rooted social problems. It learns from the patterns in their fellows’ innovations, and mobilises a global community that embraces these new frameworks to build an ‘everyone a changemaker world’.

Ashoka’s unrestricted fundraising model relies partly on the ‘Ashoka Support Network’, consisting of 350-400 members who donate at least €10,000 each year for a minimum of 3 years. Ashoka Spain has had particular success in nurturing its members, with 90% of supporters usually renewing their commitment. Its engagement strategy includes different levels and channels of interaction, and is based on the feedback Ashoka gathers through a survey that is sent to donors when they first join. Based on this feedback, Ashoka Spain designed its major donor fundraising strategy to respond to its donors’ needs and preferences:

- **360-DEGREE INVOLVEMENT:** as well as providing financial support, donors often become Ashoka ambassadors, mentors to Fellows, Board members and counsellors. They like to offer their time and network by sharing their contacts and speaking about Ashoka in the media.

- **SETTING CLEAR ROLES:** Ashoka Spain makes supporters ‘architects of its vision’ by sharing impact goals and clearly explaining the individual’s role in the Ashoka journey. This discourse, which was used to launch a new Ashoka branch in Barcelona, attracted 15 new members in just 6 months. They are co-creators, and this brings strength and recruitment opportunities.

- **‘VIP’ TREATMENT:** Ashoka Spain reserves special treatment for supporters who make large donations. This includes a personal visit by its leadership to thank them for their contribution.

- **MAKING PERSONAL CONNECTIONS:** its fundraising strategy heavily relies on the ‘power of the individual’. Most supporters came on board through personal connections, and invest in Ashoka because they trust the specific team member who manages their relationship.
Donor Offering: Asset Inventory

BUILDING A CULTIVATION PLAN

Once you have identified your audiences and what motivates them to give, it’s time for Cultivation. This is the relationship-building ‘get-to-know-you’ phase that encourages your donors to make a gift. Ultimately, it’s getting a donor to the point where they say: “What you do is amazing! How can I help?” A cultivation plan should be:

• **WELL PLANNED:** the more clarity your organisation has around how to best engage each donor, the more effective you can be making an initial or bigger ask.

• **BESPOKE:** identify which Cultivation steps best resonate with each donor and align your actions based on your growing knowledge of them.

• **STRATEGIC:** each action you take should support you to get to the point where your organisation is receiving its first gift, or increasing a gift. A plan gives you the framework to stay focused on that goal.

• **REALISTIC:** the Cultivation stage of relationship-based fundraising typically takes 12-18 months between the first interaction with a donor and their commitment of a major gift. Of course, there are exceptions to this rule (e.g. if you’re introduced by a mutual contact), but it’s important to make plans based on conservative time projections.

• **DOCUMENTED:** each touch point with a donor should be documented in a centralised database your whole team can access.

Your cultivation plan should be methodical if you want a high success rate. To create this, it’s important you take inventory of the various ways you can engage donors throughout the upcoming year. By doing that, your organisation will have a clear understanding of what you can currently offer donors to build that connection to your cause and help secure a gift, and what new offerings should be developed to further support donors towards solicitation.

Getting to the point of solicitation with any donor will take careful cultivation and time. Shaping that cultivation – and efficiently securing that donation – requires clear ‘products’, or donor offerings, to ‘sell’, especially when it comes to prospects who are less likely to provide unrestricted support.
IDENTIFYING YOUR ASSETS

Before you explore potential donor 'offerings', you need to have a clear understanding of the internal resources available to you. Non-profits often ignore or simply take for granted the potential of their assets – those elements you already own or have access to, which can make your organisation attractive to funders, and should indeed be leveraged for fundraising purposes.

With a strategic mindset, you can develop an engaging cultivation plan for your donors by maximising the resources you already have. The three categories below are only some examples of the most common ‘cards’ that non-profits can play during their 'fundraising game': people, the environment and collateral. This is by no means an exhaustive list; it is simply meant to inspire you to reflect on the specific assets your organisation 'owns', and how they may be leveraged to engage your donors.

PEOPLE

The people that make up your team, leadership and stakeholder ecosystem are likely your greatest asset, as their reputation and expertise are key to building trust with donors.

INTERNAL

SENIOR LEADERSHIP
A charismatic leader and management team can motivate and inspire donors to give by building trust in your organisation's expertise. Ensure they build their public thought leadership profiles and attend important donor meetings.

TEAM
Your staff and volunteers, are the repository of your organisation's knowledge. With their expertise and experience, they are best placed to advocate for the work you do. Building their skills and enabling them to develop professionally will greatly benefit them and your organisation.

BOARD OF TRUSTEES
Trustees are often well connected to companies, organisations, government institutions and donors. They should have a clear understanding of your organisation's fundraising strategy to leverage their connections, and make introductions to the right people.

EXTERNAL

END USERS
Depending on the nature of your work, your end users can communicate the impact of your work through their personal experience. If donors hear powerful stories of impact or have a personal connection to someone who benefited from your work, they are more likely to give.

ADVOCATES
Advocates or influencers who are not necessarily part of your organisation, can add a lot of value. Well-known local, regional or national individuals who support your cause can often be involved at events, or can secure you platforms to promote your organisation.

EXISTING DONORS
If they are supported in the right way, your existing donor base can help you develop a stronger network of donors. Provide them with powerful and easy-to-share comms and materials about your organisation, and opportunities to invite their network to events.
ENVIRONMENT
The ‘non-human’ elements surrounding your organisation can – and should – also be leveraged for fundraising purposes.

VENUES
If your facilities lend themselves well to a tour (e.g. shelters, clinics, museums, food pantries, etc.), or your office is based in a historical building, or in a place of interest, those should be leveraged for regular events or site visits with donors.

GROUND PROJECTS
If the projects or programmes you run can be visited by people external to your organisation, field visits are a great way to involve donors, get them to see ‘where the magic happens’ and witness the quality of your work.

COLLATERAL
Well-written and visually pleasing communication materials are extremely important. Make sure yours are regularly updated and polished to reflect the current state of your organisation. The section about ‘Messaging’ will further explore the power of communications in the context of fundraising.

WEBSITE
An easy-to-navigate website with a polished look, and relevant donor pages and resources will help reflect your organisation’s nature and better speak to donors who want to find out more about your work and how they can support it.

PITCH DECK
A well-written and concise pitch deck that provides a quick overview of your organisation’s mission, vision and impact is fundamental for your team to be able to introduce your organisation during meetings with potential donors.
SPOTLIGHT: HOW TEWA LEVERAGES ITS ASSETS

Tewa is a women’s fund based in Nepal. Through funding and capacity development, it supports women to organise, raise their voices collectively, and transform discriminatory policies, systems, norms and practices.

The organisation strongly believes in the optimal utilisation of local resources to strengthen trust with local communities. Its fundraising strategy relies on individual and institutional donors, and since 1997 it has been continuously raising funds from over 7,900 individual and 571 institutional Nepali donors.

As part of its strategy, Tewa has been leveraging its key assets for fundraising success. Examples include:

- **VOLUNTEERS**: Tewa trains its volunteers to support the organisation’s fundraising efforts. Through their network, volunteers link Tewa’s fundraising team with other like-minded institutions or individuals who may be interested in becoming donors, and fundraise directly.

- **VENUE**: Tewa’s infrastructure and outdoor spaces are designed to support the sustainability of the organisation. The team often hosts fundraising events, such as music performances and raffles using its own spaces. Its Open Air Theatre, with capacity for 1,000 people, is also a source of income for the organisation, as it is rented out to other organisations.
ASSET MAPPING: CREATING YOUR ‘CARDS DECK’

This exercise will help you identify the assets that are unique to your organisation and that can be leveraged for fundraising success.

OBJECTIVE
To identify your organisation’s key assets.

YOU WILL NEED

- A room (or a virtual meeting) in which to discuss as a group
- Post-It Notes or scraps of paper
- A wall, whiteboard or digital whiteboard (e.g. Google Jamboard) to share and sort ideas

HOW TO RUN THE EXERCISE

STEP 1
Divide the space on your whiteboard or wall into areas, one per category. If you identify more categories than the three provided in the example above, then add more bubbles to your diagram:

- **Collateral**
  - asset 1
  - asset 2
  - asset 3

- **Other categories**
  - asset 1
  - asset 2
  - asset 3

- **People**
  - asset 1
  - asset 2
  - asset 3

- **Environment**
  - asset 1
  - asset 2
  - asset 3

- **Your organisation**

STEP 2
Ask your team to think about your organisation’s assets – i.e. anything you own, or have access to – that could be used to engage your donors. Use the cards provided in the previous briefing for initial inspiration, and don’t be afraid to think outside the box. Be as specific as possible.

Give everyone 5-10 minutes to write down as many ideas as they can, one per Post-It.

STEP 3
In turn, ask each team member to pick their top 3 assets and share them with the rest of the team. If other team members have noted similar assets, ask them to share them as well, and create thematic clusters. Once everyone has shared their top 3 assets, continue the round until all of them have been shared and discussed collectively.

WHAT NEXT?
With your list of assets, you will be able to brainstorm ideas for your ‘Donor Offering’ exercise that follows.
Donor Offering: ‘Products’

DESIGNING YOUR ‘PRODUCTS’: A DONOR-CENTRED APPROACH

Now that you’ve identified your assets, it’s time to create a ‘product offering’ that fits into the strategic direction of your organisation and allows you to bring your cultivation plan to life.

Developing an offering requires a lot of preparation and careful thinking. The framework we suggest using for this process is called ‘human-centred design’, a creative approach developed by IDEO that encourages you to cultivate deep empathy with the people you’re designing for – in this case, your donors – by putting them at the centre of your process. Donor-centred design starts with your donors, and ends with new solutions that are tailor-made to suit their needs.
In recent years, criticisms of philanthropy and the donor-centred approach to fundraising (DCF) have emerged, as our sector reckons with the power dynamics inherent in traditional giving. Several thought leaders in the sector have formulated thought-provoking criticisms to philanthropy, uncovering its fundamental flaws. To name a few, in *Decolonizing Wealth*, award-winning philanthropy executive Edgar Villanueva explains how power dynamics in traditional philanthropy perpetuate colonialism, and what we can collectively do as a sector to change this. As well, in his recent book *Winners Take All*, Anand Giridharadas critiques the concept of plutocracy itself, and encourages wealth holders to integrate social impact with wealth accumulation.

In this paper by Rogare, a new theory of community-centric fundraising (CCF) is introduced, not as a radically alternative approach to donor-centred fundraising, but rather as a movement to change philanthropy from within. CCF is defined as ‘a model that is grounded in equity and social justice, prioritises the entire community over individual organisations, fosters a sense of belonging and interdependence, presents work not as individual transactions but holistically, and encourages mutual support between non-profits’.

CCF is a movement to transform fundraising and philanthropy as a system, so they are both ethical and accountable. In practical terms, the main message for fundraisers is their approach to fundraising should always aim to protect the wellbeing of the communities they serve – and, where possible, fundraisers should be bold enough to question (and potentially say no to) donations that come from unethical sources.

With this in mind, you are now ready to develop a ‘product offering’ that suits the needs of your donors, in full respect of your community’s needs.
WHAT DO DONORS NEED, OR WANT?
Generally speaking, donors have needs and ambitions beyond the impact of the work they fund. Some of the donor aspirations listed below apply to different audiences in different ways, but should nonetheless be considered:

1. **TO LEARN**
   They know that they don’t know everything, and want to fund as impactfully as possible, so any learning opportunities and information sharing is valuable.

2. **DEEP PARTNERSHIPS**
   Most funders who understand the complexity of supporting social impact know robust and strategic partnerships are vital.

3. **MORE DONORS**
   Current donors want to see more stakeholders join them on the journey to fund an organisation. Regular updates on your organisation’s efforts to build your donor base are important in order to retain current support.

4. **CLEAR OUTCOMES**
   Even where they understand long-term complex projects, they still want to know what will happen in the next 12 months and be able to track progress. Momentum is key.

5. **STORYTELLING**
   Donors have a need to tell good stories about their funding – although to a different extent, every funder has stakeholders who want to feel the work is brought to life.

6. **BE UNDERSTOOD**
   They don’t always want to tell partners exactly what to do, but want organisations to understand their ambitions and needs so that pitches are well aligned/easy to sell internally.

7. **UNDERSTAND**
   Even sophisticated donors are desperate for organisations to thoroughly, but simply, explain the problem – and the solution – with a clear M&E framework that will indicate success.

8. **ENGAGE STAKEHOLDERS**
   Anything from trips, volunteering, seats on advisory boards, conference speaking spots or good examples of storytelling can help them engage their stakeholders.

9. **BE VISIBLE**
   This isn’t for everyone, but funders who care about their positioning are keen to partner with organisations with good brands who can showcase their support.

10. **FEEL IMPORTANT**
    Donors want to make a difference and see how they can be leveraged to achieve greater impact through pilots, innovation, matching and sharing ideas.
HOW DO I DETERMINE MY OFFERING?
Before you start developing your ideas, you need to set the key criteria that will guide your thinking process. This should be based on your organisation’s current resources and opportunities, to leverage the work you already do and the assets you already have. We identified four main criteria you should be mindful of during your strategic thinking, but you may find your organisation should prioritise more, or other ones. Generally speaking, your product offering should be:

- **Based on your existing assets**
- **Implementable with your existing capacity and resources, or at a low cost**
- **In line with your ethos and mission**
- **Easy to ‘package’ and reuse**

The following activities will help you assess your existing offering, and prototype your new products.
PRODUCT AUDIT

Before we go on to create new products, you need to assess your existing products or benefits that your organisation currently offers donors. This will allow you to accurately evaluate which parts of your work will resonate with specific donors, as well as identify any ‘gaps’ in your offering, or an inefficient use of your current resources.

If you don’t have an existing donor offering, you can skip this exercise and move straight to the next one.

OBJECTIVE
To assess your current product offering.

HOW TO RUN THE EXERCISE

STEP 1
Individually, or as a group, list all the current products (i.e. benefits) your organisation offers to donors.

STEP 2
For each product, write down all the assets that are leveraged and what type of donors they are designed for.

STEP 3
Facilitate a collective discussion to assess the strengths and weaknesses of your current products. Based on general consensus, decide which products should continue to be part of your offering, and which ones should cease to be offered.

WHAT NEXT?
If your product audit showed any ‘gaps’ or inefficiencies in your current offering, you should design new ones that will better respond to your donors’ needs, whilst making the most of your current resources.

YOU WILL NEED
- A computer with a programme that allows you to make data tables, such as Excel

<table>
<thead>
<tr>
<th>CURRENT PRODUCTS / BENEFITS</th>
<th>ASSETS LEVERAGED</th>
<th>TARGET DONOR TYPE</th>
<th>STRENGTHS</th>
<th>WEAKNESSES</th>
<th>KEEP OR REMOVE?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Product 1 (e.g. Field Visits)</td>
<td>e.g. Our premises, volunteers, service users</td>
<td>e.g. Foundations, HNWIs</td>
<td>e.g. They are very entertaining, donors understand our work</td>
<td>e.g. They require a lot of prep work, and take up a lot of staff capacity</td>
<td>Keep</td>
</tr>
<tr>
<td>Product 2</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Product 3</td>
<td></td>
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<td></td>
</tr>
<tr>
<td>Product 4</td>
<td></td>
<td></td>
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<td></td>
</tr>
</tbody>
</table>
NEW PRODUCT DESIGN: RAPID PROTOTYPING

Now it is time to create your new ‘product offering’. What follows is a creative, rapid prototyping exercise to develop and test new ideas. This activity will use a human-centred design approach to test assumptions and help you understand what can be pitched, and to which donors (i.e. what your donors want vs. what your organisation can offer, and what your donors have to offer vs. what your organisation needs).

DESIGN THINKING: THE (ACCELERATED) PROCESS

Human-centred design consists of three essential phases:

1. **INSPIRATION**: you conduct research and learn directly from the donor (the people you’re designing for) by speaking to, or interacting with them to deeply understand their needs.
2. **IDEATION**: you make sense of what you’ve learned, identify opportunities for design and prototype possible solutions.
3. **IMPLEMENTATION**: you bring your solution to life. And you’ll know your solution will be a success because you’ve kept the very people you’re looking to serve at the heart of the process.

**OBJECTIVE**

To design the ‘product offering’ for your donor cultivation plan.

**YOU WILL NEED**

- A room (or a virtual meeting) in which to discuss as a group
- Post-It Notes, or scraps of paper
- A wall, whiteboard or digital whiteboard (e.g. Google Jamboard) to share and sort ideas

THINGS TO BEAR IN MIND BEFORE YOU START

A. THE ‘YES TEST’

Here are three key questions you must be able to answer before you get started with the design process. To ensure adoption is smooth, you want your solution to allow you to answer ‘yes’ to all three questions, and therefore sit at the intersection of this Venn Diagram:

- **VIABLE**
  - Is there a sustainable organisational model to make this work?

- **DESIRABLE**
  - Do the people this product is designed for want it?

- **FEASIBLE**
  - Can it actually be built / done?

This is how you can find the answers to these questions:

- **Viable**: using the key criteria outlined in the briefing for inspiration, build your own criteria list. In doing this, make sure to take some time to consider your current resources and team capacity, as well as anything else that would be needed to get your new product / offering off the ground for donors. This can include paid staff, board involvement, volunteers, beneficiaries, capacity to deliver and current systems.
- **Feasible**: think about your existing assets and what resources you have at your disposal (see the results of your ‘Asset Mapping’ exercise above).
- **Desirable**: think about your audience, and what you already know about them. Speak to them and get to know their needs (if you haven’t done this yet, see ‘Understanding Your Donor’).

**B. Rules of Engagement**

Dos and don’ts to remember when doing this exercise:

- **Trust yourself and your team**: this process can be uncomfortable, but it really does work. Trust it and get creative!
- **Ambiguity is OK**: by the end of the process you will come to clarity, but you won’t start there. Be okay with things being ambiguous at the start.
- **Be confident and optimistic**: this will work. You and your team will design something amazing.
- **Act like a scientist**: use a scientific approach. You have a hypothesis, you test it and learn from it, and then you do it again.
- **No bad ideas**: the first phase is about widening, not narrowing. There is no such thing as a bad idea.
- **Leave your baggage at the door**: sometimes history can get you down, if you tried something once and it didn’t work. There will be a place for that, but it is not now.
HOW TO RUN THE EXERCISE

STEP 1
Invite everyone to review and discuss the needs of your target donor audiences. To do this, use all the findings and materials you generated in the ‘Understanding Your Donor’ section above. Write your key themes on Post-Its, and stick them on a wall so you can go back to them during the process.

STEP 2
Next, do a rapid brainstorm. Ask your team the following question: ‘How might we provide exciting engagement opportunities for our donors?’

Give everyone 5 minutes to fill as many Post-Its as they can with ideas of anything that your organisation could do to engage donors. One item per Post-It! Remember: at this stage, there are no bad ideas; be wild and crazy, stay focused on the topic, and think quantity over quality.

Here are some examples for inspiration:

- Field trips to visit our projects
- Experience a day in the life of one of our service users
- Annual gala event
- Testimonial video
- Attend our workshops

STEP 3
Next, have everyone pick their top 3 ideas, share them with the group out loud, and stick them on the wall. If anyone had similar ideas, they should add their Post-Its and create themed clusters.

STEP 4
Continue going around until everyone’s ideas are shared, grouped and discussed, and you have a wall full of ideas for your future ‘product offering’.
**STEP 5**
Work together to sort these ideas so they sit at the intersection of the ‘Yes Test’ circles. This framework will help you filter ideas and prioritise the best ones: the ideas that satisfy all three criteria will end up in the middle of this Venn Diagram (where the three circles meet). These will be the ones you will take on to the prototyping phase.

![Venn Diagram Diagram]  
**Viable**  
Fits with organisational model  
**Desirable**  
Responds to donor needs  
**Feasible**  
Is realistically achievable

If you feel you have too many ideas, get the team to cast their vote and select their 3 favourites. You can go back to the other ones later.

**STEP 6**
Now it’s time to flesh out your ideas (prototyping). If you are in a large group, divide the team into smaller groups of 2-3 people, and allocate one idea to each group. If you’re a small team, develop one idea at a time. For each idea, ask yourselves the following questions:

<table>
<thead>
<tr>
<th>PRODUCT</th>
<th>TARGET AUDIENCE</th>
<th>RESOURCES NEEDED</th>
<th>CHALLENGES</th>
<th>SOLUTIONS</th>
<th>TEAM ALLOCATION</th>
<th>TIMEFRAME</th>
</tr>
</thead>
<tbody>
<tr>
<td>What is the idea? How does it work?</td>
<td>What type(s) of donor(s) would be attracted to this type of product?</td>
<td>What are the costs involved? What is needed to make it happen?</td>
<td>What difficulties might we encounter during implementation?</td>
<td>How can we prevent / overcome them?</td>
<td>Who in the organisation needs to be involved? How should tasks be allocated?</td>
<td>When should this happen? How often should it happen?</td>
</tr>
</tbody>
</table>

**STEP 7**
Congratulations! You have completed the design and prototyping of your new product range. Now it is time for action. Make sure all viable ideas have been fully developed, and the work has been allocated internally. Consult all team members who will be involved in the creation of these products, and brief them on your next steps.

**WHAT NEXT?**
With the products you designed, you can now build your cultivation plan. A cultivation plan (see template below) is a detailed list of donor ‘touch points’ to be scheduled throughout the year to develop a strong relationship with your donors. This may involve sharing relevant content, inviting them to meet you or inviting them to attend one of your events. Make sure all your action points are included in your calendar.
# Template Cultivation Calendar

<table>
<thead>
<tr>
<th>MONTH</th>
<th>OUTREACH e.g. email, invite, update, newsletter</th>
<th>TOUCH POINT e.g. coffee, event, conference, call</th>
<th>FOLLOW-UP e.g. update on discussions, personal note</th>
<th>STAFF NEED e.g. CEO time, document drafting</th>
</tr>
</thead>
<tbody>
<tr>
<td>JANUARY</td>
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<td>FEBRUARY</td>
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<td>MARCH</td>
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<td>OCTOBER</td>
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<td>NOVEMBER</td>
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<tr>
<td>DECEMBER</td>
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</tbody>
</table>
Making an ‘Ask’

INTRODUCTION

The art of directly asking for support can be intimidating, but here’s the good news: if you’re doing cultivation right, and building a strong relationship based on mutual values and strategic alignment, then solicitation becomes a natural extension of that conversation, and oftentimes donors might ask you first!

WHEN IS A GOOD TIME TO ASK?

As an industry standard, most relationship-based cultivation takes 12-18 months from the start of the relationship through to the commitment of a major gift, and it’s important you don’t rush this process.

Ideally, if cultivation is going well, you’ll know the right moment to ask because your intuition will tell you (likely around the one-year mark). Your prospective donor will already have had several opportunities to engage with your organisation (e.g. attending your events, reading your research, etc.), and will also have had a couple of meaningful 1:1 conversations with your team about values and goals. Asking directly for support then becomes a natural extension of this conversation.

However, if you find that you need to ask your network for support sooner than you’d like to, then do so, but proceed gently. In this case, it’s very important not to frame your ask as a ‘financial emergency’ (unless it’s a campaign tied to a public emergency), but rather to frame the urgency of the ask from an impact perspective. And if your donor is unable to give at this time, don’t push.

Finally, if you’re not sure if now is the right time to make an ask – ask! Donors are just human beings and they feel awkward about these conversations, too. Try something like:

‘We know you really care about achieving X with your philanthropy, which is very much aligned with our strategic focus over the next 12 months, and I can think of a few ways we might be able to collaborate. If you have the time, would now be an appropriate moment to explore what a partnership could look like? I would love to tell you more about our plans, hear about what you’re up to and share some ideas.’
HOW DO I ASK?
Whenever it happens, the key to a good pitch is context. Donors should understand the wider context of your ask in five key areas, and we recommend using these as a framework to guide your conversation. Whoever is doing the ‘ask’ needs to be able to address all areas, so if you’re unable to, then bring someone else along to support:

1. WHAT? (ACTIVITIES)
What are the activities you plan to direct your donor’s support to, and over what time period will they take place? Even for general operating support, be as specific as possible.

2. SO WHAT? (IMPACT)
Now you need to talk about impact, and the difference your donor’s support will make. It’s not enough to say ‘help us build this school’ or ‘help us preserve this species’ – you have to take this one step further and not assume donors understand the inevitable impact. Spell this out for them clearly and compellingly. What will the school accomplish for the community? Why does preserving this species matter to local and global climate resilience? Elevate your ask into a wider theory of change framework, and appeal to your donor’s humanity.

If you don’t have a theory of change, you can create one using the template available in the Warm Up.

3. WHY US? (UNIQUE VALUE PROPOSITION)
By this point, your donor understands your anticipated activities and impact, but you have to take it one step further: why is your organisation the right partner to deliver this? What makes it different from your cause area peers? What other organisations’ work can’t happen without your organisation’s success? In this competitive fundraising climate, it’s not enough simply to state ‘why our cause’. It has to also be ‘why our organisation.’

If you missed it in the Warm Up section, the Unique Value Proposition exercise will help you articulate this.

4. WHY YOU? (STRATEGIC ALIGNMENT)
Now it’s time to make your ask relevant to your donor. Reference whatever you know about their mission, strategic plan, values, priorities, passions and goals. Ensure your ask is personalised to their unique context and ambitions, so they are compelled to get involved.
5. HOW? (FINANCIALS)
To wrap up, it’s time to talk about money. Be prepared to address all of these points clearly and succinctly:

- Your overall fundraising target.
- How much support you are seeking from your donor (if you really can’t gauge their capacity to give, then just focus on the overall target).
- How much you have raised to date of that overall target, and from whom.
- How much time you have left to raise the remaining amount.
- What raising this extra amount will help you accomplish from an impact perspective (i.e. what won’t happen if you don’t raise it).
- What your future fundraising plans look like to ensure your work and impact are sustainable.

If you missed it, the Financials section in Part A will help you define your targets.

These are the questions donors will be asking themselves, so proactively addressing these points will demonstrate your expertise and professionalism, and help to build trust during this crucial ‘ask’ moment.

HOW SHOULD I REACT TO A REJECTION?
Rejections are normal, and as a fundraiser you should get used to them. But what really makes the difference is how you react them. A ‘no’ from a donor doesn’t always mean ‘never’ – instead it may mean ‘not that much’, ‘not now’, or ‘not this project’. It’s your responsibility to figure that out and here is a checklist for successful rejection management:

- If appropriate, ask directly for feedback.
- Be open to a conversation, and don’t be defensive / offended.
- Invite them to visit your offices / workplace / programmes to remove any reservations they may have on your programmes or team.
- If you still think there is a chance for future gifts, keep this donor in your database and continue to cultivate them.
PITCH PERFECT

Pitching takes practice. This is a quick exercise you can do to strengthen your skills. While most of it can be done solo, it's important to practice in front of a group at some point.

OBJECTIVE
To finetune your pitch and articulate the specific qualities of your organisation for donors to understand the wider context of your ‘ask’.

HOW TO RUN THE EXERCISE

STEP 1
Visualise your donor. Before jumping into pitch practice, it’s extremely important to articulate who you’re actually pitching to. A perfect pitch is personalised. It can’t feel generic, because then the possibility for genuine strategic alignment is lost. So, take a moment to recall the descriptions you created in the ‘Donor Persona’ section, and make sure you are able to answer the following questions:

1. What is their name? Age? Cultural background? Current location?
2. How have they come into their philanthropic wealth? Are they inheritors or self-made? Do they work as a staff member in a philanthropic institution (like a Foundation or Government body)?
3. What social impact causes matter most to them or their place of work?
4. Are they experienced givers, or new to philanthropy?
5. What key challenges might they be facing in their philanthropy?
6. What is their motivation for a philanthropic partnership?
7. Have they had previous partnerships? What did they look like?
8. What kind of support do you want from them? Just money, or something else?
9. What questions or concerns might they have?
10. Why are they the right partner for you?

STEP 2
Craft and present your pitch. Once you have a clear understanding of who you’re pitching to, try crafting a pitch to them using the following questions as the framework. Try this once for a written pitch, and then once for a verbal pitch. Share with your colleagues for feedback.

WHAT: what activities are you seeking support for? When will they take place?

SO WHAT: what impact will these activities have?

WHY YOU: how is this proposed partnership aligned with your donor’s goals? What is it about your donor’s passion and goals that makes you think this is a good fit?

WHY US: why is your organisation the right one to deliver this? What role does it play in the cause area ecosystem, and what other organisations’ work can’t happen without your organisation’s success?

HOW: how much are you asking them for? And beyond this ask, how are you planning to resource your work? What is your total fundraising target; how much have you raised to date and from who; what do your future fundraising plans look like so you ensure your work and impact are sustainable?

WHAT NEXT?
Practice, practice, practice! Make sure you practice your pitch as much as possible before you meet donors. If someone in your organisation is particularly good at pitching, ask to shadow them the next time they make an ask. Learning by doing is always the best way.
Up Next...

This is the end of Section I – and now that you’ve defined the key elements of your Fundraising Strategy, you can start bringing it to life! To prepare yourself for the Implementation Phase, in the next section you will learn about the role of your organisation’s Board and Team members, and how to leverage their skills for fundraising.
Download Sections

Please visit our website to download all the sections of this Guide

WELCOME & WARM UP

SECTION 1
PART A: Preparing For The Process
PART B: Designing The Donor Journey

SECTION 2
PART A: Preparing For Implementation
PART B: Implementing The Donor Journey

COOL DOWN & GLOSSARY