

STRONG PARKS, STRONG COMMUNITIES

Tool 18: Donor Cultivation Plan

Here is a sample donor cultivation plan for a hypothetical couple. Your plan can be this simple – and should be this strategic!

DONOR CULTIVATION PLAN | Donor: Bill and Martha Ellison

General Giving Profile

- Small donors who have given in each of the last three annual giving requests
- Significant donor to The Nature Conservancy and Audubon
- Bill served on several nonprofit boards in Boston prior to retirement
- Martha volunteers with local schools

Most Recent Previous Gift Dates

- 11/5/16 \$75
- 12/2/17 \$100
- 12/30/18 \$100

Special Interests and Notable Notes

- Bill is an avid birder and amateur photographer
- Martha is well-connected to Milltown community; multigenerational history in the area

Top Donor Cultivation Checklist

- Prior giving history to similar community organizations
- Direct personal connection to land conservation
- Understanding of land conservation strategies and tools
- Direct connection/relationship to Friends person(s)
 - Rich Smith - worked together at the State
 - Paul Cartwright – neighbor
- Participation in prior cultivation event
- Land tour
- Volunteer engagement in some capacity
- Prior initiative or proactive engagement in Friends
 - Requested information about park projects
 - Brought along and introduced Rich to neighbors at public event
- Prior giving history to Friends
- Previous major gift

DONOR CULTIVATION PLAN (continued)

Organizational Contacts: Who Stewards this Relationship?

- Primary Board Contact: Paul
- Primary Staff Contact: Rich

6-Month Cultivation Goals

- Participation in cultivation event
- Agree to volunteer for friend-raising event in 2019
- Gift above \$250
 - Potential Leadership
 - Solicitor
 - Cultivator

Mailings and Materials

- | | | |
|------------------------------|------|-------|
| ▪ Send electronic newsletter | Mary | 10/15 |
| ▪ Send Director Letter | Mary | 10/25 |
| ▪ Invite to house party | Paul | 1/10 |

Events

- | | | |
|-----------------------------|------|------|
| ▪ Invite to Fall Farm event | Mary | 10/1 |
| ▪ Invite to house party | Paul | 2/15 |

Personal Contacts

- | | | |
|--|------|-------|
| ▪ Personal note from Rich on Director's Letter | Rich | 10/25 |
| ▪ Phone call for house party | Paul | 1/15 |

Requests

- | | | |
|---|------|------|
| ▪ Send year-end mid-donor letter | Mary | 11/5 |
| ▪ Send year-end holiday card | Mary | 12/5 |
| ▪ Invite to volunteer for event in 2012 | Paul | 1/15 |