

10 Months of Donor/Prospect Cultivation from a Board Perspective – Example

Disclaimer: This document is not intended as legal advice. Your organizational goals, purpose, bylaws, and values should drive the creation of this document.

The options for board/prospect engagement are endless, but the point is to consistently connect donors/prospects to the mission through trusted voices. The donor/prospect should not just hear from the board/staff to ask for money. Show a deep interest in the relationship in ways that support the donors/prospect’s interest in mission impact. The exact list should be developed based on the capacity of each organization. Less is better and consistency and authenticity is essential. Remember, fund development is a team sport, so engage the whole team in the right spot for the greatest amount of success.

| Month | Suggested Board Action | Steps for Staff |
|-------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------|
| 1 | Pick up the phone and share a “Thank you for supporting -----” mission message. Be ready to speak authentically from your heart-head to a person or voicemail. | Provide names, numbers, and other relevant information |
| 2 | Send donors/prospects a 1-page donor-orientated newsletter that highlights the impact of philanthropic support within the mission. As appropriate, highlight donor stories of their “why” for investing. Include a personal note. | Write the newsletter Prepare the mailing packets for board members |
| 3 | Host a virtual or in-person reception for donors/prospects that highlights a mission-oriented speaker. Create space for donors/prospects to connect with each other. Board members call and invite. | Organize the reception Update board members |
| 4 | Invite donor/prospect to see something their donation supports, i.e. a mission-related site visit. Attendance is optional for donors, mandatory for board/staff. (The power is in the invitation.) | Create opportunity Update board members Make sure attendance is expected Create RSVP lists |
| 5 | Email message to donor/prospect. Activate them around any public policy initiatives you are undertaking. | Create email |
| 6 | Send a personalized copy of the newsletter over email with a cover note in your email. | Write the newsletter Prepare the mailing packets for the board |
| 7 | Invite donor/prospect to hear an out-of-town speaker and a reception following the speaker. | Create the opportunity Create the reception event |
| 8 | Invite donor/prospect to work on a mission-related project together. | Create the opportunity |
| 9 | Ask for the gift. Include all board members who are willing to make the ask. | Prepare all the necessary materials Track and follow-up Train board members |
| 10 | Send a personalized thank-you note for the gift. | Write formal letter with space for customization Provide cards for personal notes |