



NAME OF DONOR \_\_\_\_\_ PERSON ASSIGNED TO \_\_\_\_\_ DATE \_\_\_\_\_

## DONOR CULTIVATION PLAN

A donor cultivation plan is a tool to assist you in identifying the interests of your donors and matching them with the needs of your organization. Each plan is specific to a donor and should help your organization in understanding the philanthropic goals of your major/loyal prospects and developing a process to move them toward a significant investment in your organization. This process is thoughtful and intentional. The goal is to develop a personal relationship with donors based on trust and understanding centered on their needs and interests; and, at the proper time, to position your organization to ask for a meaningful gift.

We hope you will keep this document updated so that it becomes a roadmap for attaining the goals.

The following are explanations for the different areas for you to complete. The 2016-17 Harold Grinspoon Incentive Matrix requires 3 – 5 Donor Cultivation Plans. Please call or email if you have any questions. Nancy Kipnis.... [nkipnis@charlottejewishfoundation.org](mailto:nkipnis@charlottejewishfoundation.org) or 704-973-4554

### BACKGROUND

Develop a biographical background that may include, but not be limited to, hometown, alma mater, marital status, list of children and the donor's giving history to your organization and others. Include what you may or others may find interesting or insightful and help you to understand the donor's motives. It is often helpful to add friends and relatives who might be of influence.

### GOALS

Based on the information you have gathered, develop a plan to engage them as a volunteer, board/committee member or have them remain as a well-informed donor. Identify and define the short term and long term goals for this donor. Include, if possible, monetary amounts for current gifts, endowments and legacy gift.

### INTERESTS AND INVOLVEMENT

Identify the organizations, both Jewish and non-Jewish, the donor supports with time and money. List past positions, all causes and hobbies as well. Understanding why they support these organizations may unlock the door to building a strong donor relationship.

### PLAN TO INFORM AND INVITE

Plan for face to face meetings and events to which you want to invite the donor. This may include a timeline or possible dates. Once you call and confirm with donor, place them in your calendar and check off these dates as they occur.

Based on their donor interests, plan to be intentional with a focus on what you hope to accomplish. Review what you and others have told the donor and what information about your mission you want to share.

### QUESTIONS TO ASK TO REACH YOUR GOAL

Be an active listener. Your interactions with prospects and donors should never be one-sided with you doing all the talking. Open ended questions are a great way to engage your donor in the conversation and learn about long range opportunities for future involvement leading to increased annual giving and possible legacy gifts. Ask the question and wait...resist the urge to clarify or add more details...listen. Consider developing sample questions that you are comfortable asking

When did you first give to our organization and why? -- Do you have a special interest regarding our organization? What is a favorite contribution you've made and why? -- What do you see as our organization's greatest challenge? -- Can we talk about where you are with your philanthropy? -- Do you involve your children in your philanthropy? How?

Record the answers in your cultivation plan.



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**Background:**

**Goals:**

**Interests and Involvement:**

**Engagement Possibilities:**

**Plans to Inform and Invite:**

**Dates:**

**Answers to Open Ended Questions:**

**Additional Insight:**