



More Effective Individual Giving

Strategize. Organize. Prioritize.

OBJECTIVES

- Grow the donor base through segmented, targeted outreach.
- Increase donor retention and lifetime value through strong cultivation and stewardship.
- Launch scalable fundraising initiatives to support long-term goals.

PHASES

1. Assess Current Landscape & Identify Opportunities

- Conduct a baseline analysis of *all* funding sources to ensure new initiatives complement existing revenue streams: individual giving, government and private grants, earned revenue, sponsorships, partnerships.
- Identify gaps and opportunities in current fundraising efforts.
- Survey constituents (e.g., donors, board members, volunteers)

2. Strengthen Messaging, Policies & Infrastructure

Evaluate these versus industry best practices:

- Case for Support: Enhance mission messaging, highlight impact stories, and refine donor narrative.
- Data & Digital Infrastructure: Optimize CRM usage, website structure, and donor tracking capabilities.
- Donor Cultivation & Retention: Develop strategies for prospecting, onboarding, stewardship, and recurring giving.

3. Develop & Prioritize Growth Strategies

Based on the assessment, prioritize initiatives that maximize (potential) donor engagement and contributions, including:

- Direct Mail: Targeted outreach to potential and existing donors.
- Email Marketing: Donor segmentation, personalized appeals, and ongoing engagement.
- Social Media/Press Releases: Organic and paid strategies for awareness and donor acquisition.
- SEO & Paid Search Ads: Donor acquisition.
- Google Ad Grants: Enhancing online visibility.
- Local media and advertising: Radio, TV, and outdoor advertising.
- Events (e.g., galas, walks, golf tournaments): Combine recognition, social cohesion, entertainment and/or recreation.

4. Implementation & Performance Tracking

- Define budgets, performance metrics, and execution plans for selected initiatives.
- Conduct regular progress reviews and adapt strategies as needed.