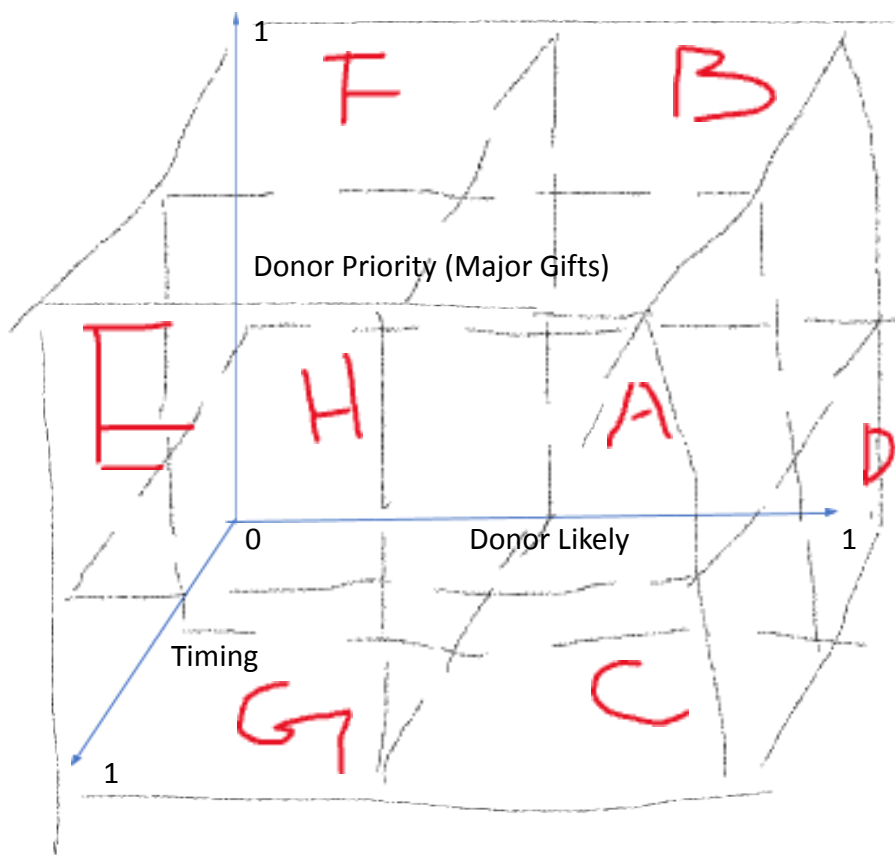


Unlocking Generosity

Strategic Donor Segmentation for Fundraising Success

By Owen (Yi) Xie

Oct. 2024



Today, we're going on a journey—a journey of how an organization, much like ours, learned to unlock the true potential of their donors by segmenting them thoughtfully and strategically. Through it, we'll see how understanding different types of supporters can lead to incredible success in fundraising.

We at the University of San Francisco always have big dreams for the future, and we relied on the generosity of our supporters to bring those dreams to life. But we also face a challenge that many organizations encounter: not all our donors are ready or able to give in the same way or at the same time.

We need a strategy. We realized that to unlock the potential of our supporters, we have to recognize the unique qualities of each donor and engage them differently. And so, we decide to group our supporters based on three key factors:

How likely they were to give this year, their Donor Likely Score,
The size of the gift they could give, or their Priority Score,
And finally, whether the timing was right for them to give, their Timing Score.

Group A Top Major Gift Prospects: High Donor Likely Score (in this FY), High Priority Score (Major Gifts) and High Timing Score
(Major Donors)

Donor Conversion Goal: 60%–70%

Importance Level: Very High

Reason: This group represents your strongest prospects. They are highly likely to give, have major gift potential, and the timing is optimal. Prioritizing cultivation and engagement with this group can yield the largest returns.

1. Personalized Outreach & Relationship Building

One-on-One Engagement: Set up personal meetings or calls with key prospects to deepen relationships. Focus on understanding their motivations, interests, and philanthropic goals.

Executive Involvement: Involve leadership in outreach (president, CEO, board members) to signify the importance of the relationship.

Tailored Communication: Reference specific projects or programs they have expressed interest in or that align with their values. Highlight the impact of their potential contributions in a way that resonates with their passions.

2. Major Gift Proposals & Custom Giving Plans

Customized Proposals: Develop a detailed, compelling proposal that aligns with their philanthropic interests, showing how their gift can make a transformative impact.

Gift Structuring: Offer creative gift options (e.g., naming opportunities, legacy gifts, or multi-year pledges) to make their contribution more meaningful to them.

Matching Gifts: Encourage prospects to consider matching gift opportunities, either from their employer or as a challenge to other donors, to amplify their impact.

3. Exclusive Engagement Opportunities

VIP Events & Experiences: Invite them to exclusive, high-level events, like private dinners with organizational leadership, behind-the-scenes tours, or unique opportunities to meet beneficiaries.

Leadership Advisory Role: Offer them a chance to join an advisory council or leadership giving society, giving them a platform to engage more deeply with your mission and vision.

Impact Reports & Recognition: Provide regular updates on the impact of their contributions, both quantitatively and through personal stories. Offer recognition that is meaningful but respects their preferences for visibility.

4. Urgency and Timely Calls to Action

Emphasize Timeliness: Highlight the significance of giving now by tying the ask to timely projects, campaigns, or urgent needs.

Milestone Campaigns: Use upcoming milestones like anniversaries, fiscal year-end deadlines, or special initiatives to create urgency around the timing of the gift.

Pledge Now, Pay Later Options: Given their high timing score, they might be inclined to commit to a gift now, with the flexibility to structure the payment over time or at a later date.

5. Data-Driven Solicitation

Targeted Appeals: Use the insights from donor likelihood, priority, and timing scores to prioritize the most responsive and high-impact prospects. These scores can help predict the right moment and method to ask for a gift.

A/B Testing: Test different messaging approaches to see what resonates most with this high-priority group. This can optimize future asks and appeals.

Follow-Up and Retargeting: Track engagement levels post-ask (open rates, event attendance, follow-up meetings) and adjust the strategy accordingly.

6. Long-Term Stewardship and Cultivation

Consistent Engagement Post-Gift: After securing a major gift, focus on long-term stewardship. Keep them engaged with regular updates, special invitations, and continued involvement in the mission.

Future Vision Conversations: Begin planting the seeds for future giving opportunities early, showing them how their support can continue to shape the future of your organization.

Peer-to-Peer Fundraising: Empower them to become ambassadors for your cause, encouraging their peers and network to support your organization, possibly by hosting events or serving as campaign chairs.

Group B Future Major Gift Prospects: High Donor Likely Score (in this FY), High Priority Score (Major Gifts) and Low Timing Score

(Major Donor Prospects, Engagement)

Donor Conversion Goal: 50%-60%

Importance Level: High

Reason: These donors have the potential for major gifts and are likely to give, but the timing may not be right. While immediate engagement might not yield gifts this fiscal year, strategic cultivation is crucial for future major gifts.

1. Nurture Relationships Over Time

Consistent Communication: Build and maintain a steady flow of communication that keeps them engaged. Share relevant updates, stories of impact, and successes related to areas of interest.

Personal Touches: Personalize your interactions through handwritten notes, tailored emails, or direct calls. Emphasize the importance of their relationship to the organization, even if you're not making a direct ask at this time.

Regular Check-ins: Schedule periodic, informal check-ins without the pressure of a solicitation. Focus on strengthening rapport and gaining deeper insights into their interests and giving motivations.

2. Focus on Engagement

Invite to Events: Encourage their involvement through low-pressure events such as virtual briefings, impact tours, or donor appreciation gatherings. These should offer value to them without the expectation of a gift.

Advisory Role Opportunities: If appropriate, consider offering them opportunities to participate in advisory councils or task forces where they can contribute their expertise. This deepens their connection to the cause without focusing on an immediate financial ask.

Survey Their Interests: Use surveys or casual conversations to gather insights into their interests and what motivates them philanthropically. This will allow you to craft a more tailored solicitation at the right time.

3. Lay the Groundwork for Future Asks

Seed Future Projects: Plant the idea of supporting future initiatives that align with their interests. Present a long-term vision where their major gift could make a significant impact. The goal is to build excitement for a future ask.

Pre-Commitments for Future Campaigns: While they may not be ready to give very soon, discuss future capital campaigns or initiatives. Seek soft commitments for future giving to position them as early supporters when the timing is right.

Multi-Year Giving Plans: Offer options for multi-year pledges that allow them to spread their contribution over time. This might help manage their timing concerns while still engaging them in a major gift commitment.

4. Offer Impact Without Immediate Pressure

Recognition Without the Ask: Provide recognition for their involvement and contributions to date (even if smaller gifts or non-financial support) to make them feel appreciated and part of the organization's success. This fosters goodwill and trust over time.

Impact Stories and Data: Regularly share stories of impact related to their interests, focusing on how previous donations have made a difference. This reinforces the idea that their future support could drive similar outcomes.

Strategic Updates: Keep them informed about the organization's future vision and goals. Tailor these updates to highlight how their future involvement could be pivotal without directly soliciting a gift now.

5. Leverage Low-Risk Engagement Options

Smaller Gift Options: Encourage participation in lower-level giving opportunities (e.g., annual fund contributions, event sponsorships) to keep them connected and engaged. Smaller gifts can keep them involved while deferring the major ask.

Matching Challenges: If they're hesitant to commit now, suggest matching or challenge gifts tied to future giving. This allows them to make an impact later when the timing is more appropriate.

Pledge Flexibility: Offer flexible giving plans, such as the option to pledge now and fulfill later, or structured gifts over a period that allows them to ease into a major commitment when their timing aligns better.

6. Long-Term Stewardship and Cultivation

Deepening Relationships: Invest in cultivating these donors through long-term stewardship. This means consistently engaging them through meaningful touchpoints, such as special updates from leadership, and offering ways to stay involved without solicitation pressure.

Engage Their Network: Encourage peer engagement, introducing them to other major donors or organizational leaders to strengthen their social ties to your organization. When they are ready to give, they'll have a stronger sense of belonging.

Plan for Major Campaigns: Position them for future major campaigns.

7. Timing-Based Appeals

Low-Pressure Updates on Organizational Milestones: Keep them informed of key organizational milestones without directly soliciting them. For example, send updates about upcoming strategic goals or campaign progress that they might feel inclined to support when the timing improves.

End-of-Year or Special Appeals: Given their low timing score, they might not respond to regular solicitations. However, targeted asks around key moments like end-of-year campaigns or during times of organizational transition (new leadership, new program launch) might resonate more.

8. Patience and Strategic Wait

Avoid Premature Asks: Given their low timing score, avoid forcing a major solicitation too early. Premature asks can risk alienating them. Instead, focus on long-term cultivation, understanding that their support will be invaluable when the timing is right.

Prepare for Readiness: While you're engaging them, be prepared for when their timing score improves. Have detailed proposals and gift plans ready for when they signal readiness to make a major commitment.

Group C Immediate Annual Fund Supporters: High Donor Likely Score (in this FY), Low Priority Score (Major Gifts) and High Timing Score (AG Donors)

Donor Conversion Goal: 50%–60%

Importance Level: Medium

Reason: These donors are ready to give and the timing is favorable, but they are not expected to contribute major gifts. Engaging them now can help with smaller but timely gifts, making them important for annual funds or smaller campaigns.

1. Immediate, Actionable Asks

Focus on Smaller, Manageable Asks: Given their lower priority for major gifts, target them with asks for mid-level or recurring gifts rather than large, transformative contributions.

Leverage Timing for Urgent Projects: Use their high timing score to focus on current initiatives, campaigns, or urgent needs. These could include annual fund appeals, special projects, or matching gift opportunities where their contribution can make an immediate impact.

Highlight Specific Impact: Present opportunities where smaller gifts can make a difference, such as funding scholarships, equipment, or specific programmatic needs. Clearly outline how their support will have an immediate and tangible outcome.

2. Create a Sense of Urgency

Time-Sensitive Campaigns: Tap into their high timing score by presenting time-bound campaigns or matching gift challenges that create urgency and incentivize immediate action.

End-of-Fiscal-Year or Calendar-Year Appeals: Since they are likely to give within this fiscal year, position your ask around key giving deadlines, such as end-of-year tax benefits or fiscal year fundraising goals.

Campaign Milestones: Encourage them to give toward achieving important milestones in ongoing campaigns, where a smaller gift can help reach a significant goal or unlock additional funding.

3. Mid-Level and Recurring Giving Opportunities

Mid-Level Giving Program: Develop or highlight a mid-level donor program that aligns with their giving capacity. Create recognition or stewardship benefits for this group that foster a sense of belonging and importance without major gift-level expectations.

Recurring Giving Options: Given their readiness to give now, offer recurring giving programs, allowing them to commit smaller, consistent donations over time. Position it as a way to provide reliable, ongoing support to your organization.

Membership or Giving Societies: Encourage them to join giving societies or membership programs where their annual or recurring contributions are acknowledged. These programs often create a pathway for future engagement.

4. Highlight Flexible Gift Structures

Pledge Opportunities: Even though they are not major gift prospects, offering flexible gift options like pledges over time can make mid-level donors feel empowered to contribute more than they initially thought possible.

Monthly Giving Plans: Offer them the option to make smaller, manageable monthly contributions that aggregate into a significant annual gift. This spreads out their financial commitment, making it easier for them to say "yes" now.

5. Engage Through Campaigns or Events

Peer-to-Peer Fundraising: Engage them through peer-to-peer fundraising opportunities, where they can make a gift and also rally their network to support a campaign. This leverages their interest in giving now without pushing for a major contribution.

Event-Based Giving: Use events as a platform for their giving. Whether virtual or in-person, fundraising events provide a context for them to give immediately. This could be through ticket purchases, auction items, or event-specific campaigns.

Crowdfunding: Consider using crowdfunding platforms that enable them to support projects where they can see immediate results.

6. Donor Engagement Without Major Gift Pressure

Impactful Recognition: Even though they are not major gift prospects, recognizing their contributions publicly or through personalized thank-yous will reinforce their commitment. Tailor recognition to the size of their gift without overwhelming them with major gift-level expectations.

Show Immediate Impact: Regularly communicate the outcomes of their contributions, emphasizing immediate and visible results. Share specific stories or project outcomes that resulted from their support.

Updates and Stewardship: Even if their giving level is more modest, engage them through consistent updates and stewardship. This will keep them connected and invested in your organization over the long term.

7. Leverage High Timing for Digital Campaigns

Targeted Email Campaigns: Use digital fundraising campaigns with clear calls to action and time-bound goals. Highlight their likelihood to give this year with messaging around urgency and impact.

Social Media Appeals: Given their readiness to give, consider reaching them through social media campaigns with compelling visuals and immediate donation options. Focus on projects that have quick, visible outcomes and can drive engagement online.

8. Encourage Matching Gifts

Employer Matching Programs: If available, encourage donors to leverage their company's matching gift programs. This can effectively double their contribution and increase their impact without requiring a larger out-of-pocket gift from them.

Challenge or Matching Campaigns: Present them with opportunities to participate in challenge grants or matching gift campaigns. Even smaller contributions can have a significant impact when combined with a matching gift or used to unlock additional funding.

9. Pathway to Major Gifts

Nurture for Future Growth: While they are not currently major gift prospects, focus on nurturing them for future larger contributions. Engage them through regular updates, thank them for their continued support, and gradually deepen the relationship. As their financial capacity or interest grows, they may become major donors in the future.

Track Their Engagement: Monitor their engagement over time. As they continue to support at smaller levels, they may eventually become candidates for higher-level solicitations, especially if their timing or capacity shifts.

Group D Potential Annual Fund Contributors: High Donor Likely Score (in this FY), Low Priority Score (Major Gifts) and Low Timing Score (AG Donors, Communication, Engagement)

Donor Conversion Goal: 30%–40%

Importance Level: Medium-Low

Reason: These donors are likely to give, but the contributions won't be major and the timing is unfavorable. Engagement efforts should be more general, focusing on keeping them involved for smaller gifts when the timing improves.

1. Low-Pressure Engagement

Regular Touchpoints Without Asking for Gifts: Maintain regular communication through newsletters, impact stories, or updates about your organization's work. Keep them informed without explicitly asking for donations. This keeps them engaged while respecting their current readiness and capacity.

Personalized Stewardship: Even though they may not be ready for a gift, personal touches such as birthday cards, thank-you notes, or phone calls from leadership can deepen the relationship and keep them feeling valued.

2. Non-Monetary Engagement Opportunities

Invite to Volunteer or Advocate: Encourage them to participate in your mission in non-financial ways, such as volunteering, serving on a committee, or advocating for your cause within their network. This deepens their involvement without pressuring them for a gift.

Ambassadorship Opportunities: Offer opportunities to serve as informal ambassadors or influencers within their peer groups. They can help spread the word about your organization without necessarily giving financially at this stage.

3. Prepare for Future Asks

Identify Future Giving Opportunities: While they may not be ready now, begin conversations about future opportunities. Discuss how they might align with upcoming campaigns or initiatives when their timing improves, planting the seed for future giving.

Position for Small, Future Campaigns: Since their timing score is low, focus on smaller, less urgent campaigns that they can engage with later when they are more ready.

4. Smaller Gift Options

Low-Level Giving Opportunities: Offer them opportunities for lower-level contributions, such as annual fund gifts, to keep them engaged in a low-pressure way. Highlight the importance of every contribution, no matter the size.

Recurring Giving: Consider presenting recurring giving options that allow them to make a smaller, more manageable commitment over time. This could feel less intimidating and more flexible for them given their current timing constraints.

5. Engage in Long-Term Storytelling

Share Impact Over Time: Regularly communicate the long-term impact of your organization's work, sharing stories and data that demonstrate the difference they could make. Emphasize the future vision and invite them to be part of that when the timing is better.

Personalized Impact Stories: If possible, tailor the stories to areas of your work they care about. Even without an immediate ask, this helps to build a strong emotional connection.

6. Keep the Door Open for Future Asks

Soft Solicitation Approaches: When engaging with them, use soft asks like "we hope you'll consider supporting this in the future" or "we'd love to have your support when the timing is right for you." This keeps the door open without pressure.

Delayed Pledge Opportunities: For donors with low timing scores, you might offer opportunities to make a commitment now but fulfill the pledge later. This keeps them engaged without requiring an immediate outlay.

7. Focus on Peer and Event-Based Engagement

Invite to Donor Events: Engage them in low-stakes donor appreciation events or informational gatherings where the focus is on community and networking rather than fundraising. These can deepen their connection to the cause and your organization.

Peer-to-Peer Fundraising Opportunities: Encourage them to participate in peer-to-peer fundraising efforts, allowing them to engage their networks in supporting your cause even if they're not personally giving at this time.

Social Engagement: Consider social or networking opportunities, such as donor affinity groups, that allow them to meet other donors and supporters, fostering a sense of community without financial pressure.

Track Engagement for Later Asks: Monitor their engagement over time, and when their timing score improves, adjust your approach to make a direct ask. Having a consistent, engaged relationship in place will make this transition smoother.

8. Patience and Long-Term Cultivation

Don't Rush the Ask: Avoid rushing a solicitation for a gift, as their timing may not be right. Premature asks could alienate them. Instead, focus on deepening the relationship, trusting that their likelihood to give will convert when they are ready.

Steward for Future Potential: Even though they aren't ready for a major gift, continue treating them as a valued supporter. Provide stewardship similar to that of major donors to create a lasting relationship and keep them engaged over the long haul.

Group E Long-Term Major Gift Nurture: Low Donor Likely Score (in this FY), High Priority Score (Major Gifts) and High Timing Score

(Planning, Prospecting, Planned Giving)

Donor Conversion Goal: 30%–40%

Importance Level: Medium

Reason: While these donors may not be likely to give this fiscal year, their potential for major gifts and favorable timing make them worth investing in. A strategic, patient approach could convert them into major gift donors in the future.

1. Highly Personalized Engagement

Deep Dive into Interests and Motivations: Conduct research to thoroughly understand their interests, philanthropic priorities, and personal values. Use this to craft a highly personalized engagement plan that speaks directly to what matters most to them.

One-on-One Meetings: Arrange personal meetings with leadership or key influencers. This could include President, VPs, board members, or program leaders who can convey the impact their gift could make.

Tailored Proposals: Create a proposal that directly ties their potential gift to a specific project or initiative that aligns with their interests. Show them exactly how their contribution will make a difference in an area they care about.

2. Position the Gift as Transformational

Emphasize Their Leadership Role: Frame the potential major gift as an opportunity for them to take a leadership role in transforming USF or a specific program. Highlight how their contribution could catalyze change, make an enduring impact, or elevate the reach.

Create a Sense of Urgency: With a high timing score, it's critical to emphasize the importance of acting now. Present timely opportunities, such as a capital campaign, matching challenge, or a critical project that needs immediate funding.

3. Demonstrate Impact with Data and Stories

Quantify the Impact: Use data and evidence to show the measurable impact of their potential gift. Whether it's the number of people served, projects funded, or innovations made possible, ensure they understand the tangible results of their contribution.

Share Success Stories: Provide powerful testimonials and stories from beneficiaries, community members, or program leaders. These real-life examples can make the impact of their potential gift more relatable and emotionally compelling.

4. Utilize Peer Influence

Involve Peer Donors: If possible, introduce them to other major donors or influential members of your donor network who can share their own giving stories and the positive experiences they've had. Peer influence can be a strong motivator, especially for high-capacity donors.

Donor Recognition Opportunities: Offer naming opportunities, leadership positions within special campaigns, or other forms of public recognition that might appeal to their desire for legacy or visibility.

5. Cultivate Their Connection to the Organization

Exclusive Invitations: Invite them to exclusive events, behind-the-scenes tours, or high-level strategy sessions with organizational leadership. This can increase their sense of ownership and belonging within the organization.

Advisory Roles or Honorary Positions: If they are aligned with your mission, offer them advisory roles or opportunities to contribute their expertise. Even if they aren't currently inclined to donate, these roles can deepen their connection and lead to future giving.

6. Leverage Matching or Challenge Gifts

Offer Matching Gift Opportunities: Present their major gift as a way to inspire others to give. A matching or challenge gift could motivate them by framing their contribution as a way to double or triple its impact through peer donations.

Collaborate on a Strategic Giving Plan: Work with them to create a strategic giving plan that matches their financial capacity and philanthropic goals. This could involve multi-year pledges, naming opportunities, or funding a specific phase of a larger project.

7. Appeal to Their Long-Term Vision

Position as a Legacy Gift: Given their potential for major giving, discuss how their gift could establish a long-term legacy. This could include naming opportunities, endowment funding, or capital project support that will stand as a testament to their generosity for years to come.

Involve Family or Advisors: For major donors, sometimes involving their family or financial advisors can help frame the gift as part of a broader legacy or estate planning strategy. This can open up conversations about larger contributions or planned giving.

8. Follow Up with Stewardship and Engagement

High-Level Stewardship: Even if they don't make a gift immediately, continue to steward the relationship. Regular updates, personal thank-yous, and invitations to special events can keep them engaged and increase their likelihood to give in the future.

Show Ongoing Results: After every interaction, send follow-up reports or updates that highlight the results of similar major gifts or the ongoing progress of your organization. Keep them informed about how they could potentially make a difference in the future.

9. Involve Leadership or Board Members

Board Engagement Opportunities: Offer them the opportunity to engage with your board or leadership in a more meaningful way. Being closer to decision-making processes can increase their interest and investment in USF's success.

10. Be Patient but Persistent

Slow Build Toward the Ask: Don't rush the solicitation if their likelihood to give is low. Build trust and engagement over time, focusing on creating a strong emotional and intellectual connection to your organization. When the timing feels right, make a thoughtful and well-timed ask.

Revisit Their Readiness Regularly: Continue to reassess their likelihood to give. Over time, their interest and inclination may grow, especially as they become more involved or see the impact of similar gifts.

Group F Major Gift Cultivation: Low Donor Likely Score (in this FY), High Priority Score (Major Gifts) and Low Timing Score

(Long Time Prospecting, Planned Giving, Researching)

Donor Conversion Goal: 15%–25%

Importance Level: Medium

Reason: These donors have major gift potential but are unlikely to give soon. Their timing is off, so you'll need a long-term cultivation strategy. Investing time now could pay off later.

1. Focus on Long-Term Relationship Building

Engage Without Asking for a Gift: Since their likelihood to give and timing are low, avoid pushing for a gift now. Instead, focus on building a personal relationship. This might involve sharing impact stories, keeping them updated on USF's achievements, and showing genuine interest in their philanthropic journey.

Personalized Stewardship: Customize your communication based on their interests, ensuring they feel valued without the pressure of giving. Regular touchpoints such as personalized emails, calls, or notes from organizational leaders can strengthen the relationship over time.

2. Offer Involvement in Non-Financial Ways

Invite to Volunteer or Participate in Committees: Engage them in advisory roles or volunteer opportunities within USF. Allow them to see the work up close without the expectation of a financial contribution right now.

Peer or Network Engagement: Connect them with other major donors or key stakeholders who share similar philanthropic values. This peer connection can foster a sense of community and encourage future giving when they're ready.

3. Prepare for Future Asks

Plant Seeds for Future Giving: While an immediate ask is not appropriate, plant the seeds for future giving. Discuss how their support could have a significant impact on upcoming initiatives or long-term projects when the timing is right for them.

Multi-Year Cultivation Plan: Create a long-term strategy that maps out steps to gradually increase their engagement. This could involve strategic invites to events, personalized impact reports, and leadership engagement over the course of several years.

4. Emphasize Legacy and Planned Giving

Discuss Planned Giving Opportunities: Since their timing and current likelihood to give are low, explore planned giving options, such as including USF in their will or creating a charitable trust. These options allow them to make a major contribution over time without the pressure of giving immediately.

Highlight Legacy Projects: Position their potential future gift as part of a long-term legacy that will have a lasting impact on USF. Frame this conversation around how they could leave a mark on the cause they care about.

5. Invite to High-Level Events

Exclusive, Low-Stakes Engagements: Invite them to exclusive, non-ask events such as VIP donor gatherings, behind-the-scenes tours. This keeps them engaged with USF in a meaningful way without pushing them to give at the wrong time.

Exposure to Key Leadership: Where appropriate, provide opportunities for them to meet with leadership or board members. These interactions can deepen their connection to the University and prepare them for future gifts.

6. Create Tailored, Future-Focused Proposals

Proposals for Future Giving: Even though their timing is low now, create a proposal for a future major gift that aligns with their interests. Highlight how their future gift could play a crucial role in the organization's long-term plans, especially for major capital projects, endowments, or transformational initiatives.

Invite Feedback on Organizational Strategy: Engage them in conversations about USF's strategic direction. Ask for their advice or input on key initiatives. This deepens their investment and sense of ownership, potentially increasing the likelihood of future giving.

7. Provide Impact Stories Without Asking

Share USF's Vision: Even though they aren't ready to give now, keep them informed about USF's vision, impact, and key success stories. Sharing updates about your long-term goals and major milestones can keep them emotionally engaged over time.

Showcase Major Gift Impacts: Highlight the outcomes of other major gifts in a way that inspires them. Share stories of similar donors who have made transformative gifts and the impact those gifts had on USF and beneficiaries.

8. Be Patient and Strategic in Cultivation

Nurture the Relationship: Recognize that it may take time to convert these donors into active major givers. Stay focused on cultivating a strong relationship through thoughtful, patient engagement, and be ready to adjust the timing and strategy as their circumstances evolve.

Monitor Their Readiness Over Time: Track changes in their situation—whether personal, financial, or timing-related. Be flexible and prepared to adjust your approach when their readiness to give increases.

9. Leverage Their Influence and Expertise

Involve Them as Advisors or Advocates: Given their capacity for major giving, they may have significant influence within their networks. Engage them as advocates for your cause, encouraging them to spread the word about your organization or introduce you to other potential donors.

Create Opportunities for Thought Leadership: Offer them opportunities to share their expertise with USF, whether through speaking at events, serving on a committee, or advising on key initiatives. This can deepen their connection and foster long-term loyalty.

10. Maintain Regular, Non-Intrusive Communication

Periodic Updates and Touchpoints: Maintain communication through periodic updates on major organizational developments. These could be newsletters, leadership messages, or personal notes. Keep the tone light and non-pressured, making sure they feel valued and informed.

Stewardship Without Solicitation: Keep them engaged through regular stewardship, ensuring they feel appreciated even without making a financial contribution. This could include invitations to events, thank-you messages for their involvement, or exclusive access to organizational news.

11. Engage Their Network

Networking Events: Host networking or small-group events where they can meet other major donors, influential community members, or your leadership team. By creating a sense of community, you can foster deeper connections that may eventually lead to giving.

Peer-to-Peer Influence: Leverage existing relationships with other major donors or board members to help increase their engagement. Peer influence can be powerful, especially for high-capacity donors who may be more likely to act when they see others within their network supporting the cause.

12. Strategic Patience for the Ask

Make the Ask When Conditions Are Right: Once the relationship has deepened and their timing has improved, plan for a carefully timed and thoughtful ask. Ensure that the ask aligns with their values and interests and presents a compelling opportunity for them to make a significant impact.

Long-Term Nurturing Strategy: Recognize that it may take several years to cultivate these donors into making a major gift. Develop a comprehensive multi-year engagement plan that nurtures their connection and provides regular opportunities to engage without financial pressure.

Group G Low-Priority Timely Donors: Low Donor Likely Score (in this FY), Low Priority Score (Major Gifts) and High Timing Score (Engagement, AG, Communication)

Donor Conversion Goal: 10%–20%

Importance Level: Low-Medium

Reason: Although the timing is favorable, their low likelihood and lack of major gift potential limit the immediate benefit of focusing on this group. You may want to engage them.

1. Focus on Immediate, Low-Level Engagement

Encourage Participation in Smaller Campaigns: Since their timing is favorable, present them with opportunities to support smaller or specific initiatives such as an annual fund, micro-campaigns, or crowd-funding efforts. This allows them to engage without the expectation of a major gift.

Low-Commitment Recurring Giving: Introduce the option of monthly or quarterly recurring donations at lower levels. These can feel less intimidating while keeping them actively involved over time.

2. Provide Immediate, Tangible Opportunities

Highlight Timely, Small-Scale Projects: Offer them opportunities to support time-sensitive projects or initiatives that have a clear, immediate impact. This might include funding specific pieces of equipment, scholarships, or community programs. Presenting a concrete, achievable goal can increase their inclination to give.

Matching Gift Opportunities: Present smaller gift opportunities that allow them to leverage matching gifts. This frames their contribution as having a bigger impact, which may appeal to them even if they aren't inclined to give large sums.

3. Short-Term, Time-Sensitive Appeals

Create a Sense of Urgency: Given their high timing score, emphasize the importance of immediate action. Time-sensitive campaigns, urgent needs, or deadlines can help motivate them to engage now, even if the gifts are modest.

One-Time Gift Appeals: Use a one-time, specific appeal tailored to their interests, such as giving to a disaster relief effort, end-of-year giving, or another urgent need where their contribution can make an immediate difference.

4. Invite to Special Events or Engagements

Low-Pressure Invitations to Events: Since they may not be likely to give, invite them to events, tours, or webinars that keep them connected to your organization. These events allow them to engage with your mission without the expectation of giving large amounts.

Exclusive Access Without the Ask: Offer behind-the-scenes opportunities or donor appreciation events where they can learn more about your work. This keeps them involved while subtly reinforcing the value of USF and its mission.

5. Emphasize the Importance of Every Gift

Make Every Gift Feel Significant: Even though these donors are low priority for major gifts, make sure they understand that their contribution—however small—is meaningful and appreciated. Reinforce the idea that every dollar counts toward your organization's success.

Focus on Collective Impact: Present the idea that many smaller gifts can make a big impact together. This can be particularly effective in peer-to-peer campaigns or annual fund drives, where their participation helps to boost overall donor engagement.

6. Use Impactful Storytelling

Share Tangible Impact Stories: Share stories that highlight the immediate difference smaller gifts are making. Personal stories of beneficiaries, impact reports, and updates on successful smaller campaigns can help inspire action.

Personalized Communications: Tailor your communications based on their interests, sharing stories and updates on the specific programs or areas they care about. This can keep them emotionally invested, even if they aren't giving large sums now.

7. Keep Communication Low-Key and Appreciative

Gratitude and Stewardship: Even if they make a small contribution, show deep appreciation through thank-you messages, personalized notes, or impact reports. This can build goodwill and strengthen their connection with USF.

Consistent but Non-Intrusive Updates: Keep them informed with regular, low-pressure communications such as newsletters or social media updates. This keeps them engaged without overwhelming them with solicitations.

8. Create a Soft Approach for Larger Contributions Later

Encourage Them to Move Up the Giving Ladder Over Time: Even if they start small, keep them on a track toward potentially higher giving in the future. You can gently introduce ideas about planned giving or multi-year pledges as they become more involved.

Highlight the Potential for Future Major Gifts: Even though their priority score is low now, subtly reinforce that there could be opportunities for them to make a larger impact in the future. This prepares the groundwork for potential future asks without making them feel pressured now.

9. Capitalize on Peer or Group Influence

Engage Them in Donor Networks or Affinity Groups: Encourage participation in affinity groups, alumni networks, or cause-specific donor circles. Being part of a group of engaged donors can increase their sense of belonging and might inspire them to give more over time.

Peer Recognition: Publicly recognize smaller contributions alongside major donors. Knowing that they are part of a community of supporters can increase their motivation to give, even at a modest level.

10. Utilize Matching Challenges

Maximize the Impact of Smaller Gifts with Matching Programs: Offer them opportunities where their contribution will be matched by a major donor or corporate partner, emphasizing how their gift can have an outsized impact.

Crowd-Funding and Campaign Challenges: These are excellent vehicles to leverage their high timing score while allowing them to engage in a way that feels impactful without requiring a large personal contribution.

Group H Minimal Engagement Group: Low Donor Likely Score (in this FY), Low Priority Score (Major Gifts) and Low Timing Score

(Future Engagement, Communication)

Donor Conversion Goal: 5%–10%

Importance Level: Low

Reason: This group is the least likely to give, lacks major gift potential, and the timing isn't right. While it's important to maintain basic engagement, they should be your lowest priority.

1. Maintain Basic Engagement

Regular, Low-Pressure Communications: Keep these donors in the loop with general updates through newsletters, annual reports, or social media. The tone should be informative and engaging, but without asking for donations.

Highlight Organizational Successes: Share stories of impact and achievements that demonstrate the value of your work. While they may not be ready to give, keeping them informed about USF's progress helps maintain a connection.

2. Nurture Long-Term Relationships

Focus on Cultivation Over Time: Given their low likelihood and low timing, think of this group as a long-term cultivation opportunity. Regular touchpoints such as holiday cards, event invitations, or personalized communications can help nurture the relationship without the pressure of an ask.

Stay Connected on Special Occasions: Acknowledge birthdays, anniversaries, or milestones with a simple note of appreciation or recognition. Small gestures can help keep the relationship warm for future opportunities.

Advocacy and Ambassadorship Opportunities: Provide chances for them to advocate for USF, perhaps by sharing content on social media or bringing others into the fold. Their contribution can be their time or influence, even if they're not ready to give financially.

3. Create Low-Key Touchpoints

Non-Solicitation Updates: Send periodic updates that focus solely on sharing information and stories. Avoid including donation appeals in these communications, but keep the content engaging and relevant to their interests.

Invite to Community or Educational Events: Offer them opportunities to attend educational webinars, workshops, or community-focused events that reinforce their connection to the University without a financial expectation.

4. Engage in Broader Campaigns

General Annual Appeals: Include them in broad, organization-wide campaigns such as annual giving or year-end appeals, but without high expectations. Ensure these campaigns focus on the collective impact of small gifts, which could encourage them to give at a modest level.

Crowdfunding or Participation-Driven Campaigns: Engage them in small, easy-to-join campaigns like crowdfunding efforts or participation-driven events. This could involve something simple, like donating a small amount or signing up for a challenge, to keep them engaged at a low level.

5. Highlight the Importance of Community

Showcase Community Impact: Reinforce their connection by highlighting how their involvement, no matter how small, contributes to the overall mission of USF. Community-centric messages help build a sense of belonging.

Recognition in Broad Communications: When possible, acknowledge their support in community-wide communications (e.g., newsletters or donor listings), reinforcing their importance without focusing on their gift size or immediate potential.

6. Avoid Over-Soliciting

Limit Solicitations: Because their likelihood and timing for giving are low, avoid frequent asks that could lead to donor fatigue. Instead, focus on building trust and a long-term relationship without the pressure of giving.

Carefully Time Any Appeals: If you do reach out for a gift, time it carefully around broad campaigns or significant organizational milestones where participation is encouraged across all donor levels.

7. Keep Them in the Fold

Ensure They Don't Disengage Completely: It's important to avoid losing touch with this group altogether. Even though their potential for giving this fiscal year is low, maintaining some level of communication ensures they stay connected to USF in case their circumstances or interest change.

Low-Cost Stewardship: Maintain light touchpoints that require minimal resources but still convey appreciation and engagement, like automated email updates or general organization-wide mailings.

8. Stay Attuned to Future Changes

Monitor for Changes in Engagement or Capacity: Be mindful of any changes in their personal or financial situation that might increase their likelihood to give in the future. Whether it's a change in professional role, a connection to a new project, or increased involvement in USF's activities, be ready to adjust your strategy if their circumstances shift.

Plan for Future Engagement When Timing Improves: Keep them on your radar for future campaigns when their timing score improves or other circumstances change. Being patient and maintaining a light connection now can pay off later when they become more engaged.

9. Utilize Broad-Based Stewardship Programs

Segment Communications for Low-Touch Donors: Create general stewardship programs or communication streams for donors with low giving likelihood and low priority. These streams should focus on providing updates and maintaining the relationship without expecting much in return.

Build Donor Loyalty Over Time: Focus on building long-term donor loyalty through thoughtful, non-pressured engagement. Regularly highlighting USF's mission and impact will keep them connected and may increase their inclination to give in the future.