

Donor Management Strategy

Table: Characterize different individual donor categories

Donor Type	Description	Age	Income	General Fundraising Event	Mothers Day Garden	Highmark Walk	Sponsor Thank You Party	Annual Appeal	Project	Monthly Donor	Volunteer
				February	May	June	September	December			
Major Gift	Passion for the Cause	40s-70s	Upper						Capital Project		No
Charitable Trust	Visible Investor	45-65	Upper				X	X			By Invitation
Legacy Giving	Passion for the Cause	Old	Above Average				Aging Out	X	Designated Program		Aging Out
Annual Giving	Loyal Donor	All	All	X	X	X	X	X		X	Yes
Opportunistic Giving	Situational Ask	All	All	X		X					By Invitation

Next Steps:

- 1) Continue to develop donor category profiles and tailored approaches for each category
- 2) Work with Roxanne to mine and tag the existing donor database with data gathered from cocktail party sponsors
- 3) Develop a list of potential legacy giving donors through conversations with Bill and Marcy
- 4) Interview a sampling of Legacy Giving Donors to help us shape a legacy giving program
- 5) On an evergreen basis share individual donor data with Board Members to tag individuals to churches and continue to build -up data on donors from their congregations