

Sample Cultivation Strategy

Donor Prospect: Jazzy Jay Jefferson

Capacity Ratings

Rating	Range	Description
Major Gift Capacity	\$1 million - \$2 million	Stretch gift over five years
Annual Gift Capacity	\$30,000 - \$70,000	Gift in one year
Planned Giving Capacity	\$3 million - \$5 million	Estate or structured gift from assets

Wealth Stats

Largest Gift:	\$250,000*
Real Estate:	\$5.7 million
Income Estimation:	>\$250,000
Stockholdings:	\$4.2 million
Other Assets:	\$800,000-\$1 million



*Grant made by his family foundation.

Solicitation Strategy

Primary Solicitor:	Fundraiser	Secondary Solicitor:	Business Dean
Date Assigned:	11/1/2010	Target Ask Date:	June, 2012
Primary Interest:	Alumni; business	Secondary Interest:	Children
Target Ask Amount:	\$150,000	Potential Gift Type:	Endowed Scholarship
Primary Giving Motivation:	Family/religious values	Possible Challenges:	Lapsed engagement Closer to other charities

Cultivation Strategy

- Other people close to the prospect who should be involved (e.g., External: loved ones, advisors or Internal: colleagues, staff, volunteers)
 - Wife, Janet, and the professor she remains in contact with
 - Dean of the business school
- Additional Research Needed
 - Research profile complete; set-up alerts on Mr. Jefferson's Central Europe and Czech Republic funds
- Initial Strategy Outline
 - Jazzy Jay and Janet have intermittently supported the annual fund, demonstrating some continuing engagement with the university. Fundraising contact has not been made in over five years. Through Janet's relationship with her former professor, bring her on campus to explore ways we could engage her and her husband. Hopefully she will be interested in the scholarship committee as it looks to address the needs of women students who have children.

- Action Plan Details (insert actual days as they are scheduled and review monthly)

Date	Action	Objectives	People
Nov 2010	Meet with Janet's former professor and make sure she is on appropriate mailing lists	<ul style="list-style-type: none"> • Discover more about the relationship and her interests • Plan ways to bring her on campus 	Fundraiser
Jan 2011	Schedule meeting with Jazzy Jay and Janet while they are in Florida (if possible, invite to annual dinner party with the President)	<ul style="list-style-type: none"> • Introduce as newly assigned liaison • Update on campus activities and the family foundation gift • Find out motivations for giving to university and others 	Fundraiser
May-Jun 2011	Invite to graduation events on campus and meal with scholarship committee leadership	<ul style="list-style-type: none"> • Meet students who have children • Ask to join scholarship committee 	Fundraiser Business Dean Students
Jul-Sep 2011	Contacts over phone and email while they are summering in Europe		
Jan 2012	Dinner Party with University President		President
May 2012	Ask for scholarship gift (with time to close gift before they go north)		

Information used to create strategy

- Conversations with donor prospect's internal contacts
- Ongoing cultivation visits
- Gift history to organization
- Research profile or wealth screening
- Giving history to other organizations

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