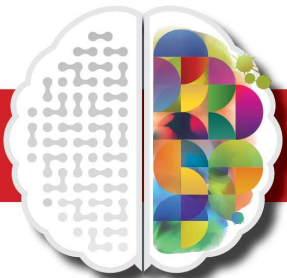


# Designing a Major Gift Cultivation Team, Strategy and Plan that Delivers Results

Jeremy Cramer, Facing History & Ourselves  
Doug Barker, Barker & Scott Consulting

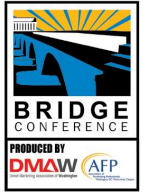


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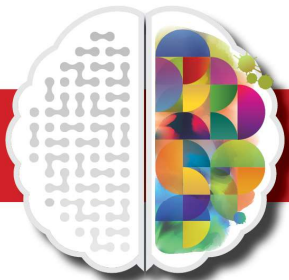
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# Learning Objectives

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- Learn how to assemble an effective cultivation team - what the roles should be and who should play them.
- Learn how to approach developing a cultivation strategy and plan.

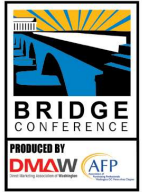


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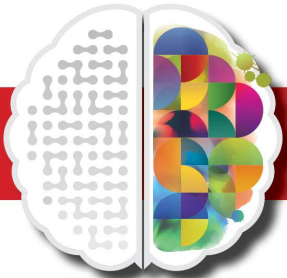
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# Agenda

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- Speaker Introductions
- About Facing History & Ourselves
- Assembling a Cultivation Team
- Developing a Cultivation Strategy and Plan
- Case Studies
- Q&A
- Takeaways

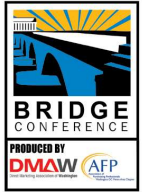


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# Introductions

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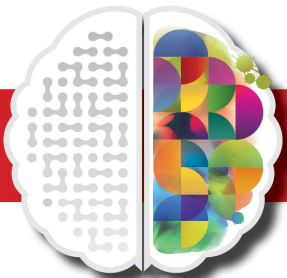


## Jeremy Cramer

Chief Development Officer  
Facing History & Ourselves

## Doug Barker

Principal & Co-Founder  
Barker & Scott Consulting



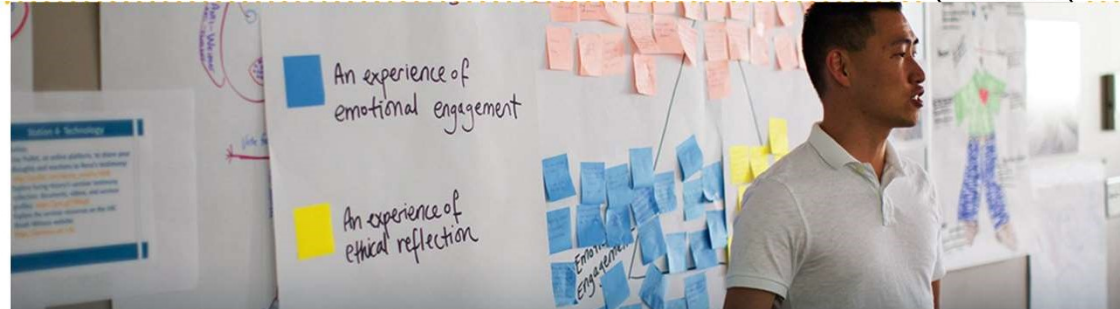
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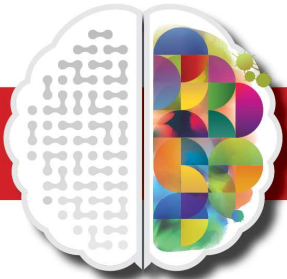
# About Facing History & Ourselves



Every day, reports of incidents of bigotry and hatred across the globe show us how fragile democracy can be.



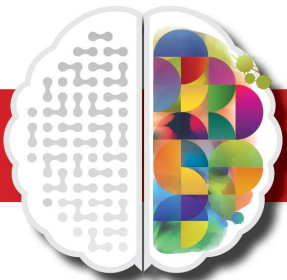
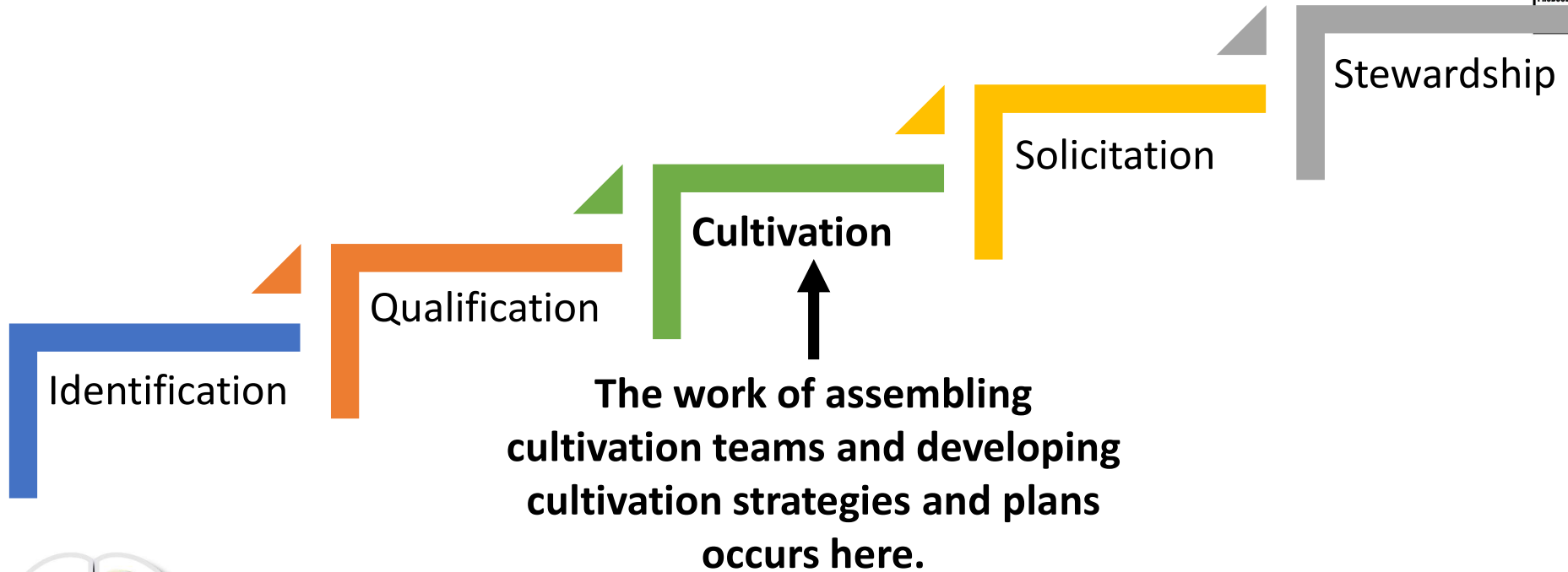
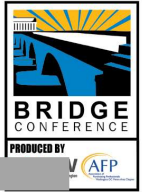
*Facing History's approach heightens students' understanding of racism, religious intolerance, and prejudice; increases students' ability to relate history to their own lives; and promotes greater understanding of their roles and responsibilities in a democracy.*



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# Framework for Relationship Management: “Moves Management”



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# Assembling a Cultivation Team



## **Strategist** *(One or More)*

Serves as a coach or consultant to the Relationship Manager in developing the strategy to secure a major gift and/or meet a strategic goal.

## **Relationship Manager** *(One Individual)*

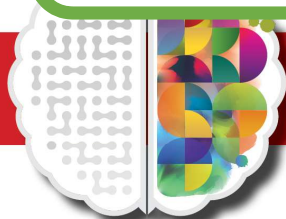
Has overall accountability for the prospect and is responsible for strategically advancing the relationship, and overseeing the day-to-day execution of the cultivation strategy. This role is ideally fulfilled by a Development professional.

## **Natural Partner** *(One or More)*

Has an influential relationship (directly or indirectly) with a prospect that can be leveraged. The relationship may be pre-existing or develop during the course of cultivation.

## **Program Partner** *(One or More)*

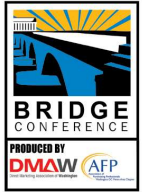
Serves as the “content team” by providing programmatic subject matter expertise to assist with the case for donor support. This role is always fulfilled by a staff member.



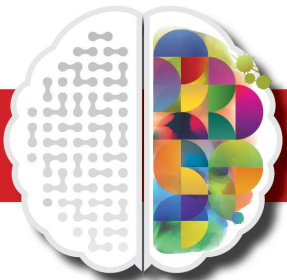
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# Developing a Cultivation Strategy & Plan: Prep Work



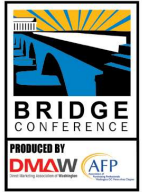
- Assign a Relationship Manager
- Assemble the Cultivation Team
- Conduct/review initial research to understand:
  - Prospect's giving interests
  - Giving history to other organizations
  - Wealth events
  - Potential funding opportunities aligned with the prospect's interests
  - Past engagement or giving to leverage in the cultivation process



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# Developing a Cultivation Strategy & Plan: Key Components



## Goals

- Target giving level to pursue
- Strategic objectives to accomplish in addition to securing a gift (e.g., recruit to the board)
- Target timeframe for solicitation

## People

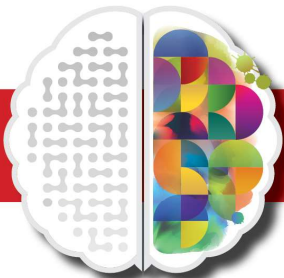
- Ways members of the Cultivation Team are expected to be involved in cultivation

## Alignment

- Known messaging that resonates with the prospect
- Potential funding opportunities aligned with the prospect's known interests

## Planned Interactions

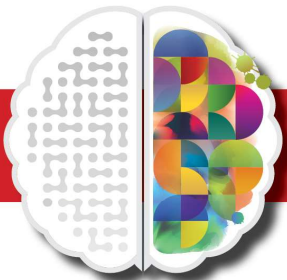
- A set of strategic interactions - minimally 1 every 3 months - to be performed by members of the Cultivation Team



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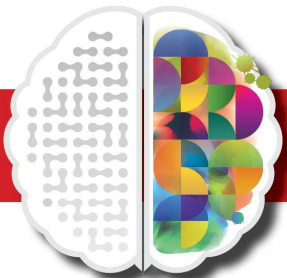
# Case Studies



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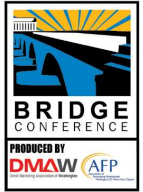
# Q&A



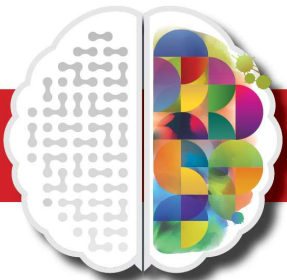
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# Takeaways



1. Make the cultivation team as broad and deep as necessary.
2. Work as a team to develop an effective cultivation strategy and meet regularly to assess progress and/or adjust strategy.
3. Leverage relationships that are meaningful to and trusted by the donor; set egos aside.
4. Use research to gather intelligence about the prospect.
5. Document every interaction.



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# Thank You!

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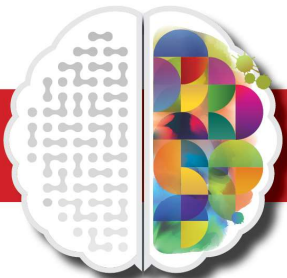


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