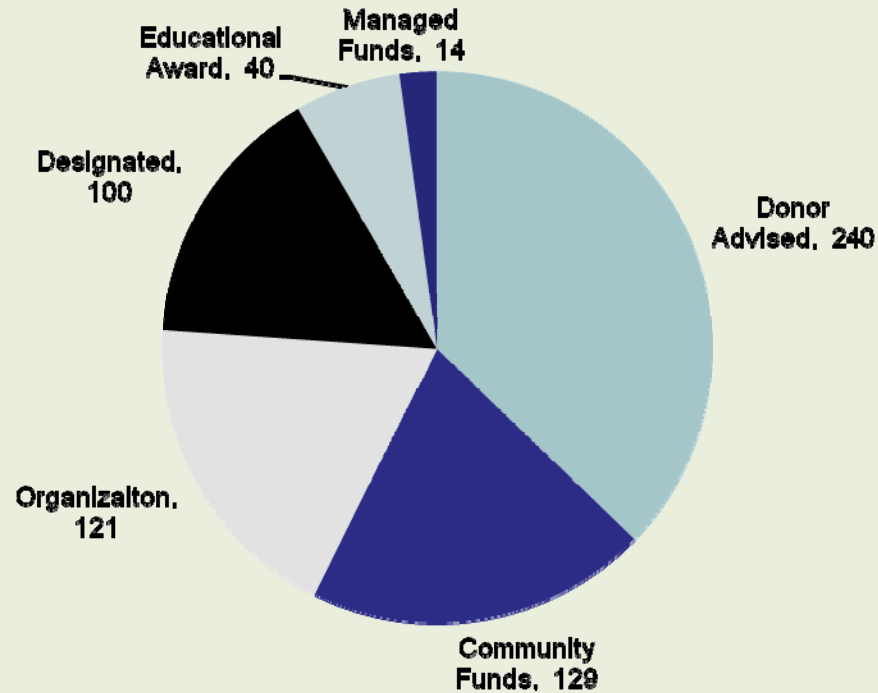


DIRECT FROM DONORS: TAKING DONOR ENGAGEMENT TO THE NEXT LEVEL

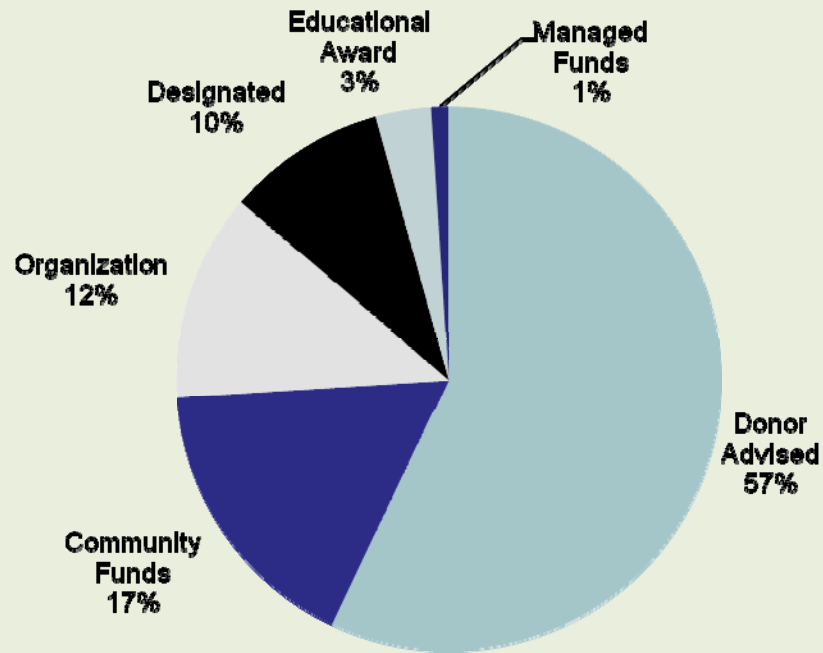
Cornelia Duck
Lucy Hensel
Bibi Patel
David Sweanor

Community Foundation of Ottawa
Vancouver, 2011

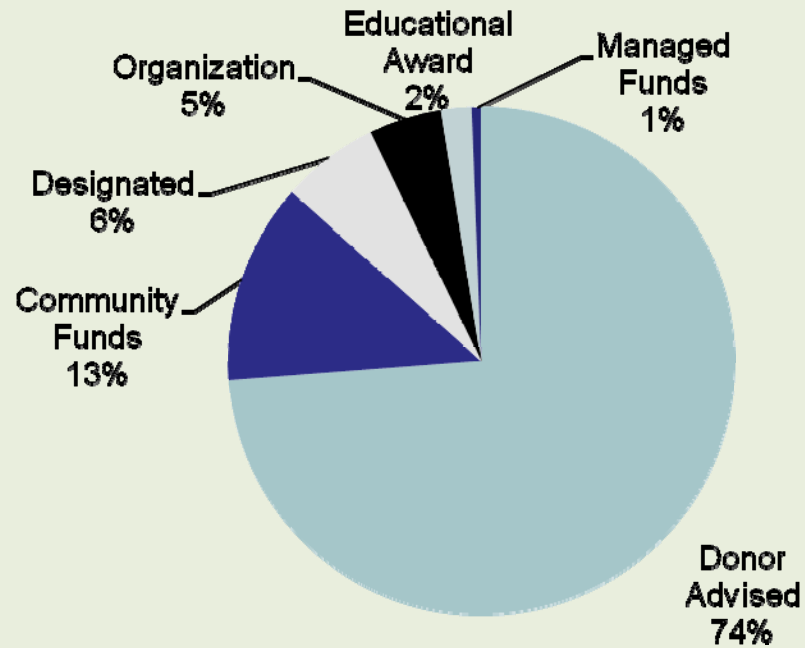
FUNDS BY NUMBER - 2010



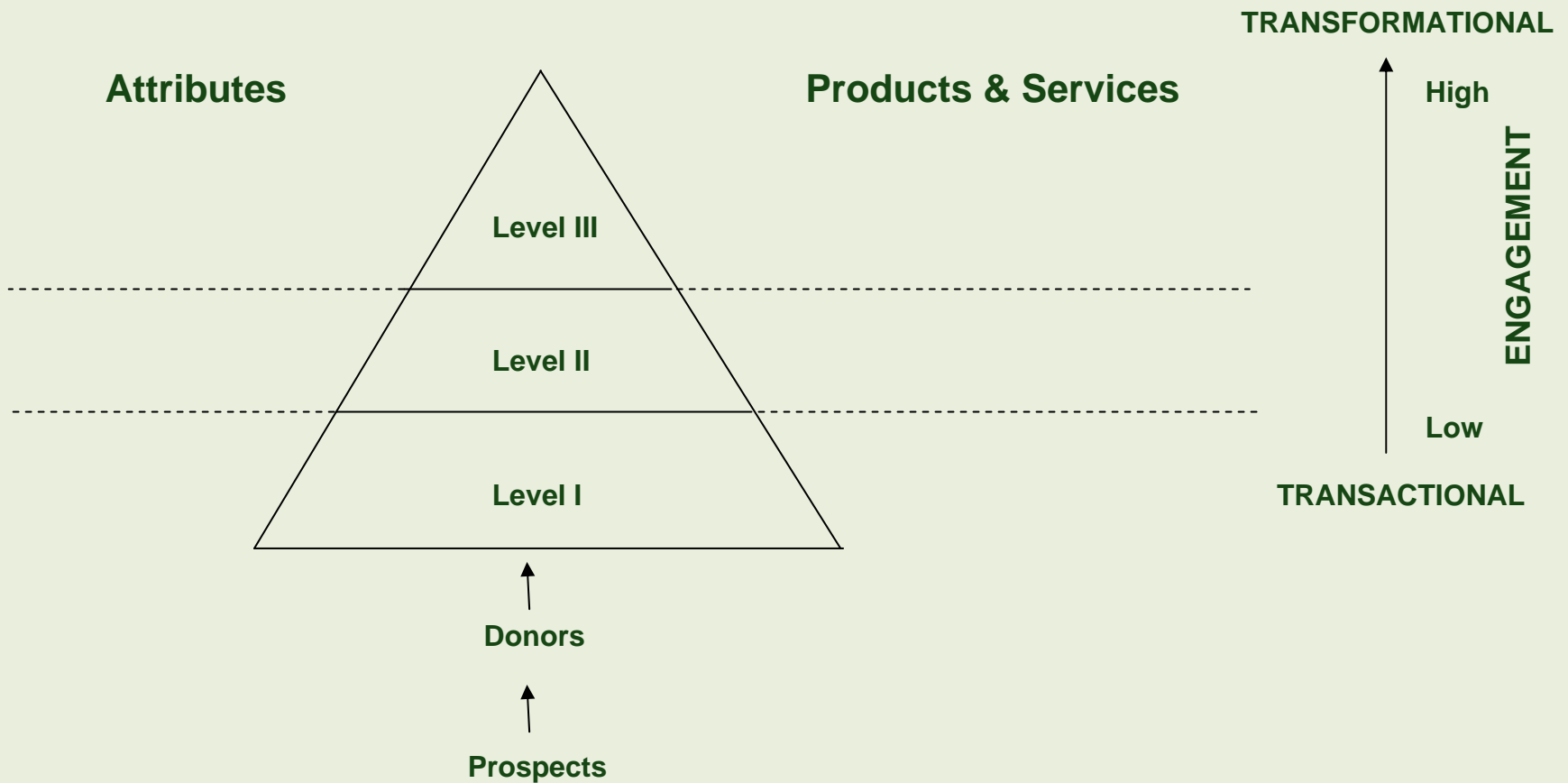
FUNDS BY VALUE - 2010



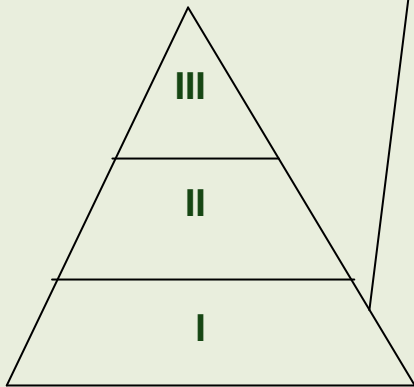
FUNDING SOURCE FOR GRANTS & DISBURSEMENTS - 2010



FRAMEWORK FOR CFO MODEL OF DONOR ENGAGEMENT

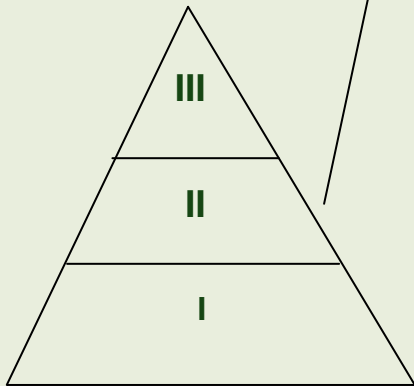


LEVEL I ATTRIBUTES



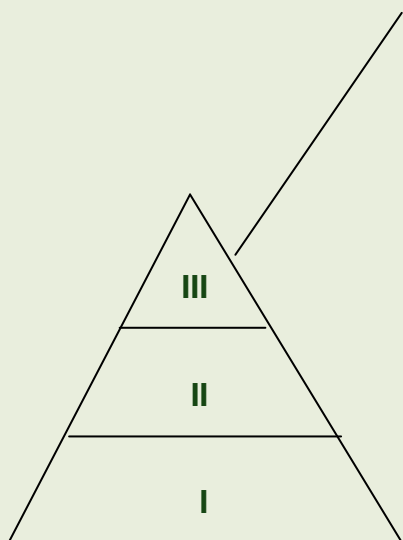
- Mostly DES donors but could be any type
- Donors with deferred gifts
- Size of fund irrelevant
- Primarily interested in stewardship and transactional excellence
- Little – no response to funding community grants and/or proactive grantmaking

LEVEL II ATTRIBUTES



- Some DAF, but mostly FOI and UNR donors
- Funds at \$50K - \$100K level
- “Active” funds already (subsequent gifts; grantmaking; etc.)
- CFO Ambassador
- Ability/interest in growing their funds
- Open to some engagement (site visits; learning and sharing knowledge)

LEVEL III ATTRIBUTES



- Mostly DAF donors
- Funds at \$50K+ level
- “Active” funds already (subsequent gifts; grantmaking; etc.)
- Optimal candidates for “transformational giving”
- Most likely to benefit from high engagement
- Ability/interest in growing their funds
- CFO Ambassador
- Referral source for new donors
- “Influencer” or potential to be
- Open to a range of active engagement strategies
- Interest in learning and sharing knowledge, willing to mentor others
- Identified successor advisors
- Responsive to “high touch” donor relations
- Engaged grantmaker (either proactive or a funder of community grants)
- Already or interested in collaborating with us
- Evolving to subject matter experts from whom the CFO can learn

INTEGRATION ACROSS THE ORGANIZATION

