

Template | Donors Prospecting



Note: You have already created a strategic plan, as well as a timeline and budget based on the strategic plan. Healthy and stable management of an organization is the key for sustainable development and the foundation of your fundraising work. It is time to conduct your fundraising activities, using this chapter in combination with your strategic plan and annual activities. This template aims to help you identify potential donors and make plans to cultivate your relationship.

1. Please list at least 5 actions to collect donor information.

1. E.g. collecting information online

2. E.g. asking partners about donors' information

3.

4.

5.

Note: Three questions for your consideration:

1. There is a lot of information and resources online, but what websites do you plan to visit and what information can these websites provide? How would you collect the resources that are helpful for you?
2. Among the people I know, such as colleagues, volunteers and board members, who can share with you some donor information?
3. Where do donors get information about NGOs? Is it possible for us to attend these kinds of events?

2. Plan your activities under each action, review the information you have collected and discuss your follow-up plans.

Action: e.g. Collect information online	Results	Next Step	Person Responsible
Activity 1: E.g., Search website with information of all foundations	E.g., Identified 15 foundations working on the same issues	E.g., Visit each of the 15 foundations' website	E.g., Mr. Zhang

3. List potential donors that work in the same area as you. Keep a complete and living document to capture key information about donors, any interactions you have had, and planned next steps.

Donors Names	Funding Priorities	Recent Funding Plans	Interactions	Next Step	Person Responsible
(E.g., Family Foundation)	(E.g., Youth health, sex education, etc)	(E.g., reproductive health education in Asia)	(E.g., wrote an email to the program officer)	(E.g., arrange a meeting with the program officer)	(E.g., Mr. Zhang)

Note: While searching for donors, organizations need to keep track of the information gathered in order to better organize information, plan for the next step, and avoid duplicated work. You can add more columns to this table and make it a separate document to keep all donors’ profile. The columns can include, but are not limited to, donor background, program officers’ information and contact numbers, etc.

4. Based on the first three steps, choose a potential donor who is likely to work with you, but that you have never contacted. Reach out to the donor and build a relationship with them. Record the whole process.

1. Why did you choose this donor? List three main reasons:

a. _____

b. _____

c. _____

2. How will you obtain the contact information of the donor and how will you build a sustainable relationship? List three main actions:

Action 1 :

Action 2 :

Action 3 :

(E.g., obtaining contact information via a mutual contact, sending out initial introduction and inquiry emails, and sending your organization's briefing materials, etc.)

3. How will you conduct follow-up for the three actions listed above?

Actions	Person Responsible	Deadline	Follow-up Plan
Action 1 (E.g., email to the foundation's program officer)	(E.g., Mr. Zhang)	(E.g., June 30 th)	(E.g., Respond to the email before the deadline and plan for the next action.)