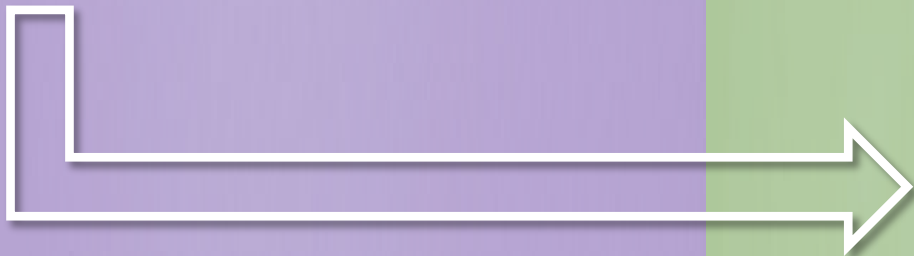


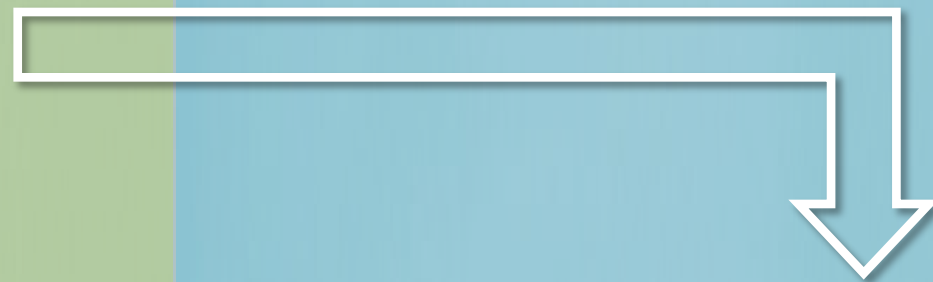
# Reignite Your Donor Pipeline Through a Shared Engagement Strategy

Megan Cheever  
Corinne Green Endres

**The Vision**



**The  
Process**



**The Tools**

The top half of the slide features a solid purple background. Scattered across this background are several white, stylized cloud shapes. These clouds have soft, irregular edges and are layered to create a sense of depth. Some clouds are positioned higher and appear smaller, while others are lower and larger. Each cloud has a subtle dark purple drop shadow beneath it, making them look like they are floating above the surface. The clouds are primarily located in the upper half of the slide, framing the title area.

# The Vision

# Background



# The Challenge

Develop a shared engagement strategy that grows the donor pipeline:

- Elevated strategic events and opportunities
- Donor centric focus
- Increase the level of touchpoints
- Shared divisional resource

# The Solution: Shared Vision

- Centralize the conversation around donor and alumni engagement at events:
  - Keep activity in **service of goals**
  - Increase **value not number** of programs
  - **Personalize** wherever possible – inspire donors
- Develop divisional processes and tools to elevate

# Building the Process

- Comprehensive event and program analysis
  - **Editing** was crucial
  - **Reinforce, Leave Behind, Enhance**
- Processes
  - Planning, approvals and support centralized
- Consistent **evaluation & feedback**

# Lessons Learned

- Created a New Strategic Engagement Team
- Project Management Tools were needed
- Leadership Reinforced Process
- We have to keep evolving



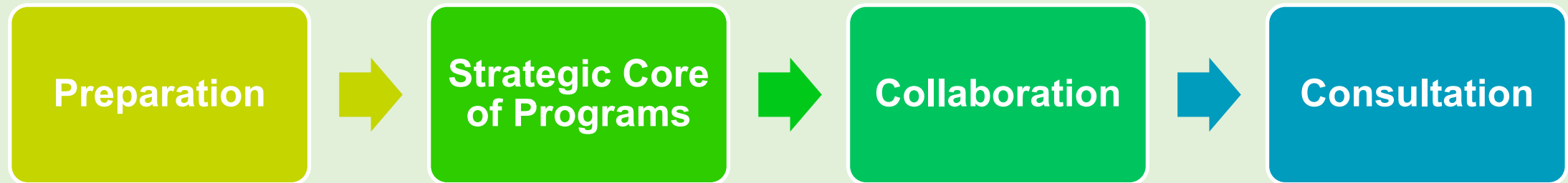


# Year Two

- Collaborative Shifts as a division
  - Earlier Work Plans
  - Built a calendar with a strong core first
    - Presidential Transition
    - Donor Stewardship
    - Special Celebrations
  - Launched Project Management Tool

# The Process

# Building a Fiscal Year Engagement Plan



# Preparation

- Homework
  - Goals/Vision
  - Top Prospects
  - Regions
  - Content
- Plans of Work
  - Events
  - Travel

# Strategic Core of Programs



University Leadership Travel



Top Prospect Engagement Opportunities



Council Meetings and Awards

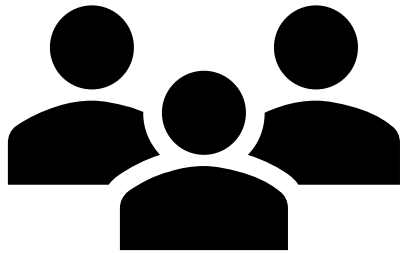


Top University Priorities to Platform



Identifying Conflicts and Gaps

# Collaboration



1 Engagement-Based Discussion

2 Partners at the Table

3 Full Transparency

# Consultation

- 1:1 reviews of recommendations with fundraisers
- Build out, adjust, synergize, and table
- Engagement Summits
  - Open Discussion
  - Brainstorming



# The Tools

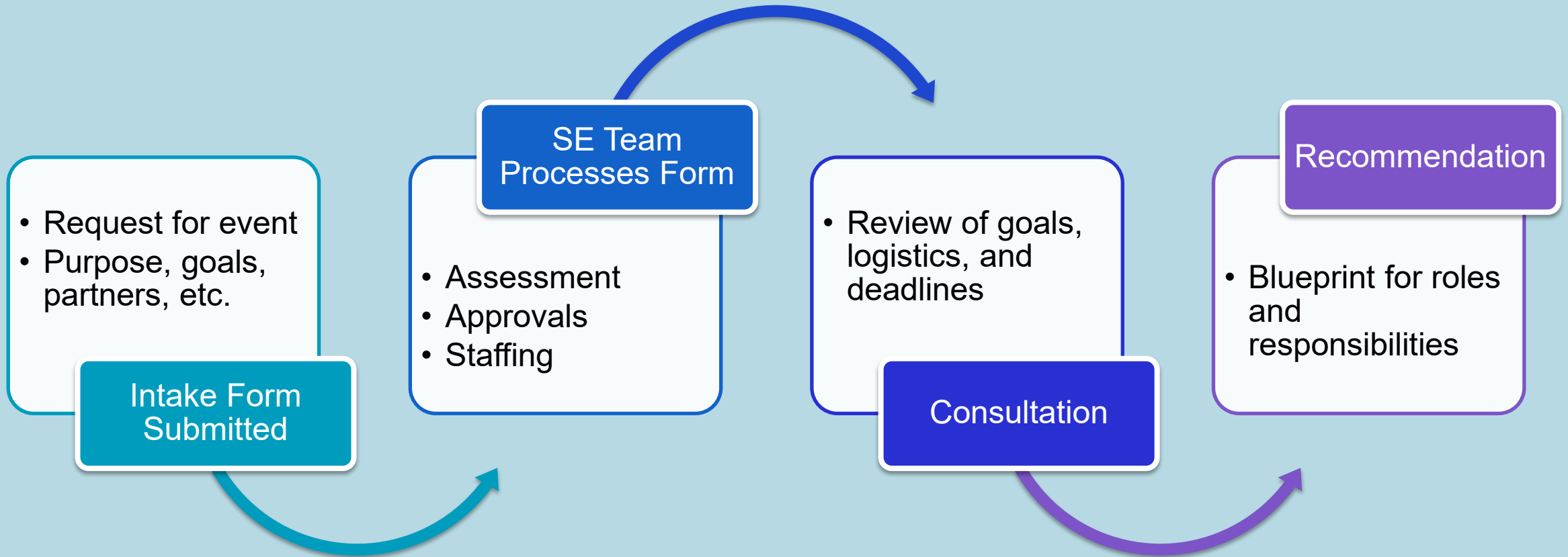


# From Planning to Execution

- The Intake Process
- Templates and Resources



# The Intake Process



Presidential  
and Leadership  
Coordination

Briefings

Venue and  
Vendor  
Management

Project  
Management  
Tools

Contract  
Management

Budget  
Templates

Attendee  
Communication

Coding  
Procedures

Google Drive

Interpreter  
Contacts and  
Requests

Invitations

Prospect  
Research

Shared  
Language

New Employee  
Onboarding

RSVP  
Management

Hosting  
Procedures

Nametags

Placards

Event Blueprint

Seating Charts

Talking Points  
and Scripting

Follow Up  
Strategy

Venue and  
Vendor  
Inventory

Event Materials

Volunteer and  
Speaker  
Materials



# The Future

# REFLECTIONS

- Advanced planning
- Focus on collaborative conversations
- Emphasis on shared tools and strong resources
- Consistent evaluation
  - **Reinforce, Leave behind, Enhance**

# Your Homework

Lead with purpose-driven content

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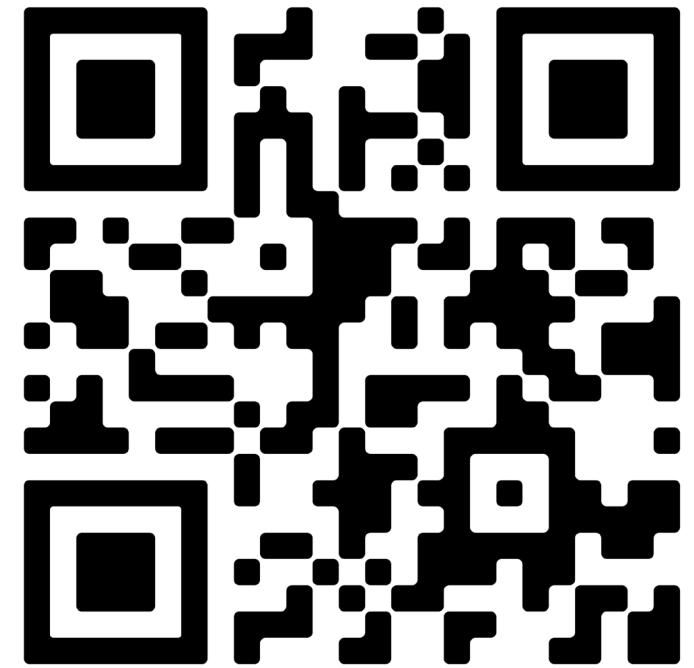
Build buy-in with partners

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Refine your resources



**You get our  
templates!**





**Megan Cheever**



**Corinne  
Green Endres**



**Resources &  
Templates**





**You get our  
templates!**

