

# MAJOR DONOR ENGAGEMENT PLAYBOOK FOR ARTS ORGANIZATION LEADERSHIP



# WHAT YOU'LL GET OUT OF THIS GUIDE:

The following guide contains tips for understanding donors, finding potential donors, and ways to maintain relationships with existing donors.

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# FOUNDATION: UNDERSTANDING MAJOR DONORS

## WHO ARE MAJOR DONORS?

Individuals who make large, transformational gifts—often \$5,000+, but this varies by organization size. They typically want a deep connection to the mission and to see measurable impact.

## WHY THEY MATTER:

Major donors often contribute a large percentage of overall fundraising totals, fund capital campaigns, and help establish long-term financial stability.



# PROSPECTING: IDENTIFYING THE RIGHT DONORS

## **1. LEVERAGE INTERNAL DATA:**

- Analyze past donation records to spot high-value or frequent donors
- Identify patrons or ticket buyers with long-term engagement
- Look for upgrades in giving patterns

## **2. USE WEALTH AND PHILANTHROPY TOOLS:**

- Wealth screening services (e.g., iwave, DonorSearch, WealthEngine)
- Public records: foundation board lists, political contributions, real estate

## **3. BOARD AND PEER NETWORKS:**

- Ask board members for warm introductions
- Use peer mapping exercises to identify shared contacts

## **4. COMMUNITY RESEARCH:**

- Attend civic events, art openings, and fundraisers
- Read business journals, philanthropic reports, and local donor lists

# RELATIONSHIP BUILDING STRATEGIES

## 1. RESEARCH BEFORE ENGAGEMENT

- Know their interests (e.g., art forms, education, access, legacy)
- Understand their giving history and philanthropic motivations

## 2. STRATEGIC TOUCHPOINTS

- Invite them to performances, rehearsals, and exhibit previews
- Share behind-the-scenes updates or impact stories
- Celebrate their milestones (birthdays, anniversaries, achievements)

## 3. CREATE LEADERSHIP ACCESS

- Offer one-on-one time with Artistic Director or Executive Director
- Include them in visioning or strategic planning conversations (advisory role)

## 4. RECOGNITION AND EXCLUSIVITY

- Provide naming opportunities (seats, galleries, programs)
- Host VIP donor events with artists or leadership

## 5. CONSISTENCY OVER TIME

- Build a year-round cultivation plan (not just when a gift is needed)
- Use CRM tools to track all interactions and notes

# PERSONALIZED DONOR OUTREACH TECHNIQUES

## 1. SEGMENTATION AND PERSONALIZATION

- Customize outreach by donor profile (interest, giving level, history)
- Use personalized emails, handwritten notes, and tailored proposals

## 2. STORYTELLING AND IMPACT

- Use compelling stories that reflect their values
- Share real-world outcomes: student growth, audience feedback, media coverage

## 3. ASK STRATEGICALLY

- Make the ask during an in-person meeting, ideally after multiple engagements
- Tie the ask to a specific program or initiative they care about
- Be clear, direct, and confident in the request amount and purpose

## 4. FOLLOW-UP AND STEWARDSHIP

- Thank promptly and personally
- Report back with progress, results, and testimonials
- Maintain the relationship even between campaigns

# ROLES OF LEADERSHIP

## **EXECUTIVE DIRECTOR RESPONSIBILITIES**

- Lead cultivation of top-tier prospects
- Attend high-level meetings and events
- Coordinate internal teams for unified messaging

## **BOARD MEMBERS' ROLE**

- Open doors and make introductions
- Participate in solicitations (when comfortable)
- Serve as peer ambassadors

## **DEVELOPMENT STAFF SUPPORT**

- Provide research, materials, and strategy
- Track donor activity and coordinate follow-ups

## **METRICS & SUCCESS INDICATORS**

- Number of personal touches per prospect per quarter
- Number of new major donor prospects in pipeline
- Average gift size increase year-over-year
- Retention of major donors year-over-year
- Event attendance and engagement levels

# MAJOR DONOR ENGAGEMENT EVALUATION CHECKLIST

Evaluation Item		Evaluation Notes
Major donor prospects are identified and prioritized.	Yes No	
Donor data and giving trends are reviewed regularly.	Yes No	
Board and peer networks are leveraged for introductions.	Yes No	
Personalized profiles are developed for top donor prospects.	Yes No	
A cultivation plan with specific touchpoints is established.	Yes No	
Major donors receive invitations to special events or previews.	Yes No	
The Executive Director is actively involved in donor cultivation.	Yes No	
Donor interests and giving histories inform the engagement approach.	Yes No	
Compelling stories that align with donor values are communicated.	Yes No	
Clear and timely asks are made, tied to specific initiatives.	Yes No	
Thank-you communications are prompt and personalized.	Yes No	
Impact and outcomes are reported back to donors regularly.	Yes No	
Donor engagement is tracked in a CRM or donor management tool.	Yes No	
Donors are involved in strategic conversations where appropriate.	Yes No	
Donor retention and growth are measured year over year.	Yes No	
Major donors are engaged throughout the year, not only during campaigns.	Yes No	



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