

DSC Fundraising Now

Network Mapping & Cultivation Planning

The most effective way of starting a new relationship with any funder is by being introduced by a mutual contact, or ensuring your organisation or project is represented in spaces they frequent (such as events, conferences, meetings with mutual contacts, etc.). In order to have a clear view of which connections you can use for this, and spot any connections you might have missed, a network map is important to create. As a follow up to I.G. Advisors' workshop at DSC Fundraising Now, below are some key steps to get you started in two scenarios.

1. Finding Connections With Existing Prospects

If you've already identified a key prospect – and just need to strategise your approach through identifying connections – each key member of your team and board should follow these steps:

1. Firstly, look up this prospect on LinkedIn to quickly see if you have any mutual contacts.
2. If no obvious route is found – in a document, list your current key places of connection (e.g. other boards, companies people currently or previously worked for, clubs you are a member of, Universities attended etc.) – and list out the names of key people at these places you have a strong connection with (i.e. people you would feel comfortable reaching out to via email).
3. Do the same for your prospect, highlighting any immediate overlaps. Focus on connections in your locale, initially.
4. If no connections immediately appear, repeat this exercise (for both you and the prospect), but this time by listing the organisations, projects or conferences you/they have been previously involved with as (ex)staff, trustees, volunteers, alumni, or speakers.
5. Continue until there are significant overlaps in either dataset, and list these as 'connections'.
6. Explore your connections further, checking for any red flags (see below for examples).
7. Respectfully ask your connectors for advice on the best approach, whilst suggesting your preferred one. Sense-check how keen and capable they are of speaking on your behalf, and what sort of 'ask' you want made (e.g. a coffee introduction, permission to connect you via email, an event invite?).
8. Make use of as many connections as possible to cultivate different people and levels. And be sure to keep your internal teams and board in the loop about any active conversations and approaches.

2. Identifying New Prospects

If you are looking to comb through your network to identify prospects not already on your radar – begin with Step #2 listed above:

1. In a document, list your current key places of connection (e.g. other boards, companies people currently or previously worked for, clubs you are a member of, Universities attended etc.) – and list out the names of key people at these places you have a strong connection with (i.e. people you would feel comfortable reaching out to via email).
2. Keep going until you have a map of connections around you within which key names (e.g. big companies, foundations, wealthy individuals) appear.
3. Research the giving history and potential of each name or business to determine the viability. Strategise the approach using your connections and equip yourself with all relevant materials (template cultivation planner below).

Standards:

- A 'strong' connection is someone who you know well, and who knows the prospect well.
- A 'positive' connection is someone who likes your organisation, and who the prospect would respect the opinion of.
- Potential red flags for a connection include: bad relationship or employment history between two individuals or organisations (e.g. being fired), a public disagreement on any topic (e.g. contradictory op-eds), reputational doubt on your connector, any vested interest for the connector (e.g. commission, separate business dealings).

Sources:

- LinkedIn is the number-one tool, and provides built-in data privacy and consent for research on donor prospects.
- Charity Commission & Companies House will tell you who is on the board of any UK company or charity (including foundations). There are some equivalents in other countries too where relevant.
- Google search their name alongside keywords such as 'donates', 'supports', 'invests', 'conference', 'gala', 'event', 'sponsor', and anything else relevant to your network.

Template Prospect Cultivation Plan

Prospect Name:		
Priorities		Potential Matches
<i>What does the donor care about?</i>		<i>Where do your work, or your ambitions, overlap?</i>
Staff & Leadership	Notable Connections	Your Connections
<i>Who are their key people?</i>	<i>Which people or organisations are they connected to?</i>	<i>Which connections do you have with them, or their network?</i>
Need To Learn	Need To Show	Engagement Opps
<i>What do you need to get to know about this donor?</i>	<i>What is it important for this donor to learn about you?</i>	<i>Which events, spaces and forums do your networks overlap in? What are you hosting you could invite them to?</i>

Template Cultivation / Stewardship Calendar

	Outreach <i>e.g. email, invite, update, newsletter</i>	Touch Point <i>e.g. coffee, event, conference, call</i>	Follow-Up <i>e.g. update on discussions, personal note</i>	Staff Need <i>e.g. CEO time, document drafting</i>
January				
February				
March				
April				
May				
June				
July				
August				
September				
October				
November				
December				

Example Prospect Cultivation Plan

Prospect Name:	Joe Bloggs Trust	
Priorities	Potential Matches	
<p><i>What does the donor care about?</i></p> <p>Environment and climate Wildlife conservation Ethical business Women's Rights Scottish independence</p>	<p><i>Where do your work, or your ambitions, overlap?</i></p> <p>Women's rights – VAWG project Social enterprise – investing in women-led start-ups</p>	
Staff & Leadership	Notable Connections	Your Connections
<p><i>Who are their key people?</i></p> <p>Joe Blogs Jane Smith</p>	<p><i>Which people or organisations are they connected to?</i></p> <p>Greenpeace Shoreditch House Trust Women Conference Chris Hoy Reading University</p>	<p><i>Which connections do you have with them, or their network?</i></p> <p>Joe Smith (Jane's brother) David Bell (Reading Uni) John Baker (SH)</p>
Need To Learn	Need To Show	Engagement Opps
<p><i>What do you need to get to know about this donor?</i></p> <p>Current priorities for funding Strategic changes coming? What kind of women's rights issues are the focus? What kind of events and experiences are most welcome? How important is involving family? Who makes the final decisions (board? Committee? Family?) What deadlines are there, if any? Which staff are best to build relationships with?</p>	<p><i>What is it important for this donor to learn about you?</i></p> <p>We have projects that align with their priorities We're trying to do things differently, and become sustainable through business We have a lot of ways for donors to be involved We need £30,000 We have other great donors involved, and are credible</p>	<p><i>Which events, spaces and forums do your networks overlap in? What are you hosting you could invite them to?</i></p> <p>Holiday Season Party Webinar on VAWG Invite to speak at Women In Business panel event Trust Women Conference Invite to Thank You event Conference call with Donor Circle</p>

Example Cultivation / Stewardship Calendar

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September	Ask Jim to introduce via email, invite for coffee	Informal coffee meeting, learn more about priorities	Invite to holiday season party	Fundraiser / CEO
October		Go to Shoreditch House event with John Baker		Fundraiser / CEO
November	Email to say 'see you at Trust Conference?'	Attend Trust Conference, connect over lunch	Email to say it was great to see them, and look forward to party	Conference attendee
December		Holiday Season Party	Send holiday card and thank you for attending party	All staff
January	Invite to VAWG webinar			Plan webinar
February	Invite to speak at Women in Business panel event	Webinar on VAWG	Thank you email and ask for feedback on Webinar	Deliver webinar, Programme Team needed, Plan panel event
March	Invite to Thank You event, reach out for coffee	Informal coffee meeting, learn more about priorities	Invite to conference call with Donor Circle	
April		Women In Business panel event	Email with feedback from event attendees, and thank you card	Deliver panel event, CEO needed, plan thank you event
May	Project team send general update on interesting project	Thank You event		Deliver thank you event, whole team and beneficiaries needed

June		Conference call with Donor Circle	Email to Invite to come to office for tour	Fundraiser / CEO
July		Conduct tour, followed by careful pitch meeting	Follow up with formal proposal, and thanks	CEO Plan content for newsletter
August	Summer newsletter	Everyone will be on holiday	Everyone will be on holiday	Everyone will be on holiday