

The Donor Cultivation Cycle Checklist

A practical guide to help schools and nonprofits build stronger donor relationships – from identifying potential supporters to maintaining meaningful engagement after a gift is made.



TASK

Identify

01

Find people with a potential connection to your organization.

- ☐ Pull a list of alumni, current and former families, and community members with an existing connection
- ☐ Identify people who have attended events, volunteered, or engaged with your organization
- ☐ Note any known interests, giving potential, or capacity indicators where appropriate
- ☐ Cross-check against current donor records to avoid duplicating outreach
- ☐ Prioritize prospects based on their connection and likely affinity

Research & Qualify

02

Build a clearer understanding of each potential donor before deciding how to engage them.

- ☐ Review previous giving history and past engagement
- ☐ Identify their strongest connection point to the organization
- ☐ Note interests, causes, or initiatives they have supported elsewhere
- ☐ Confirm their preferred contact method, where known
- ☐ Check for existing relationships with staff, board members, or other donors
- ☐ Determine the most appropriate next step for engagement

Connect

Begin or strengthen a personal relationship without leading with an ask.

03

- ☐ Identify the most natural person to make the initial contact
- ☐ Personalize the outreach by referencing their connection to the organization
- ☐ Focus the conversation on relationship-building rather than fundraising
- ☐ Listen for interests, motivations, and areas of connection
- ☐ Record relevant notes and set an appropriate follow-up reminder

Cultivate & Engage

Deepen the relationship by creating meaningful opportunities for continued engagement.

04

- ☐ Add them to relevant communications based on their interests
- ☐ Share stories, updates, or initiatives they may find meaningful
- ☐ Invite them to appropriate events or opportunities to engage
- ☐ Offer a low-commitment way to become more involved
- ☐ Personalize future interactions based on what you have learned
- ☐ Log interactions so future conversations can build on previous engagement

Prepare & Solicit

Make a clear, relevant, and appropriately timed request for support.

05

- ☐ Ensure the individual has been meaningfully engaged before making an ask
- ☐ Match the request to a program, initiative, or purpose they care about
- ☐ Determine the appropriate level and type of support to request
- ☐ Decide who is best positioned to make the ask
- ☐ Choose a setting and timing appropriate to the conversation
- ☐ Prepare a follow-up plan for different possible responses

Thank & Acknowledge

Recognize the donor and their contribution promptly, personally, and appropriately.

06

- ☐ Send a personal thank-you promptly after receiving the gift
- ☐ Reference the specific contribution and its intended purpose
- ☐ Confirm recognition preferences before making any public acknowledgement
- ☐ Complete any required gift acknowledgement or follow-up
- ☐ Record the gift and any relevant next steps

Steward & Continue the Relationship

Maintain the relationship and help the donor understand the impact of their support.

07

- ☐ Share meaningful updates on how the contribution is being used
- ☐ Keep the donor connected through relevant communications and stories
- ☐ Look for appropriate opportunities for continued involvement
- ☐ Record new interactions, interests, and preferences
- ☐ Reassess where the donor currently sits in the cultivation cycle
- ☐ Identify the next meaningful opportunity to strengthen the relationship

Keep the Cycle Moving

Strong donor relationships are built over time. Thoughtful stewardship creates new opportunities for engagement, allowing the relationship to move naturally back into cultivation and continue growing.

Use this checklist as a guide to help your team build, manage, and maintain stronger donor relationships at every stage of the cycle.

Notes
