

# The Donor Pipeline as a Management Tool

250 prospects  
Value of pipeline = £1m

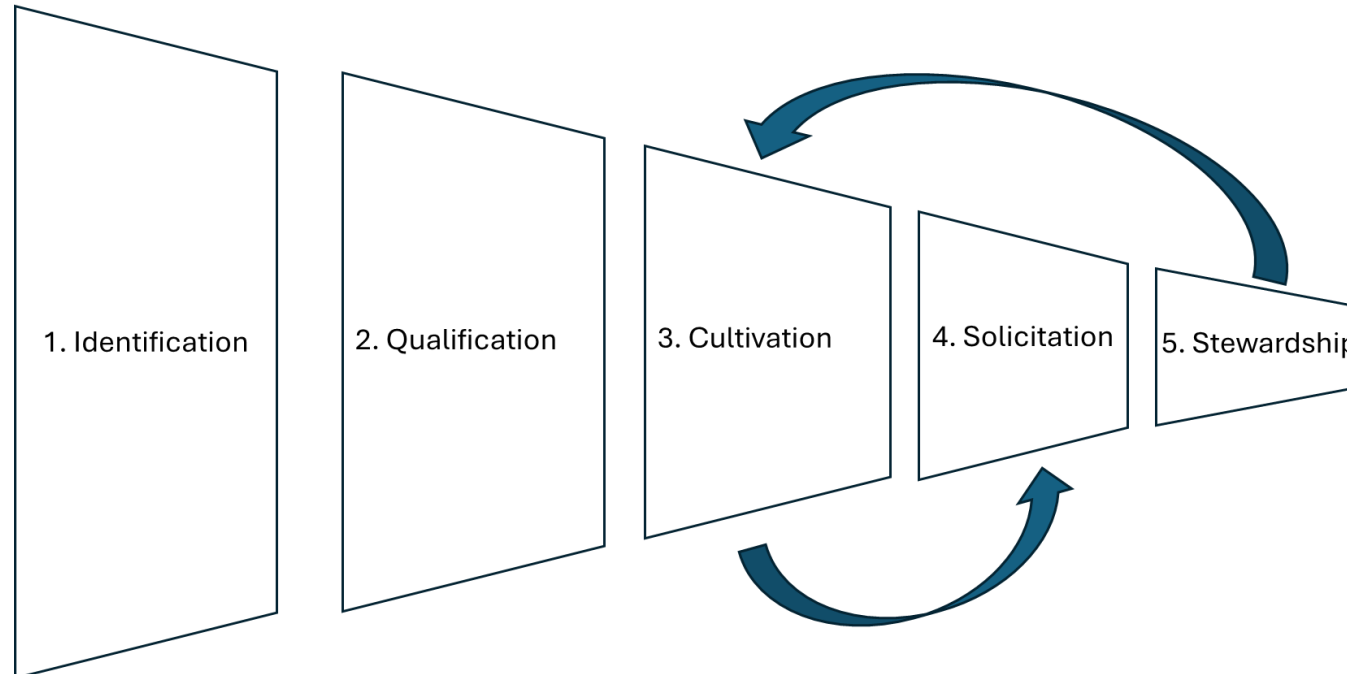
**Conversion**

50 donors  
Value of donations = £250k



## 7 different income streams:

1. Major donors
2. Individual giving
3. Trusts & foundations
4. Corporates
5. Statutory – including lottery
6. Legacies from gifts in wills
7. Community and events



## Tracking progress

1. Number of names at each stage
2. Value of pipeline (£)
3. Number of meaningful engagements (meetings, coffees, phonecalls)
4. Number of live proposals
5. Number and value of new pledges
6. Number of lost opportunities

**1. Activities:** prospect research, database conversation with existing friends and supporters, newsletters, networking events

**2. Activities:** donor meetings, further research, giving record, prioritisation (score based on capacity, propensity and access)

**3. Activities:** meetings with organisation leaders, invitations to events, coffee meetings, newsletters, personalised emails with relevant updates, phone calls

**4. Activities:** written proposal submitted, senior person makes a verbal ask

**5. Stewardship:** gift agreement signed, thank you letter, impact report, donor dinner, tour of site, project updates, phone calls, project newsletters, plaque unveiling

## The 7 income streams

Income Stream	Key Activities	Pros	Cons
Major Donors	Prospect research, personal approaches, bespoke proposals, 1:1 meetings, tailored stewardship	Transformational funding; long-term champions	High effort; long cultivation; risk of reliance on few donors
Corporate	Sponsorship pitches, employee fundraising, cause-related campaigns, payroll giving	Profile and networks; strategic partnerships	Competitive; may require compromise
Trusts & Foundations	Research funders, tailored bids, reporting impact, relationship building	Significant funds; repeatable	Time-consuming; restricted funds
Statutory (incl. Lottery)	Monitor opportunities, detailed applications, consortium bids, compliance reporting	Large-scale; long-term funding	Competitive; heavy compliance
Legacies	Legacy marketing, in-memoriam giving, steward pledgers, solicitor links	Transformational gifts; low cost pipeline	Unpredictable; long cultivation
Individual Giving	Direct marketing, social media, donor journeys, monthly giving, appeals	Reliable donor base; scalable	Ongoing investment; high attrition
Community & Events	Organise events, support fundraisers, local PR, schools/groups engagement	Awareness & engagement; strong local ownership	Labour-intensive; modest/variable income