

The Donor Pipeline as a Management Tool

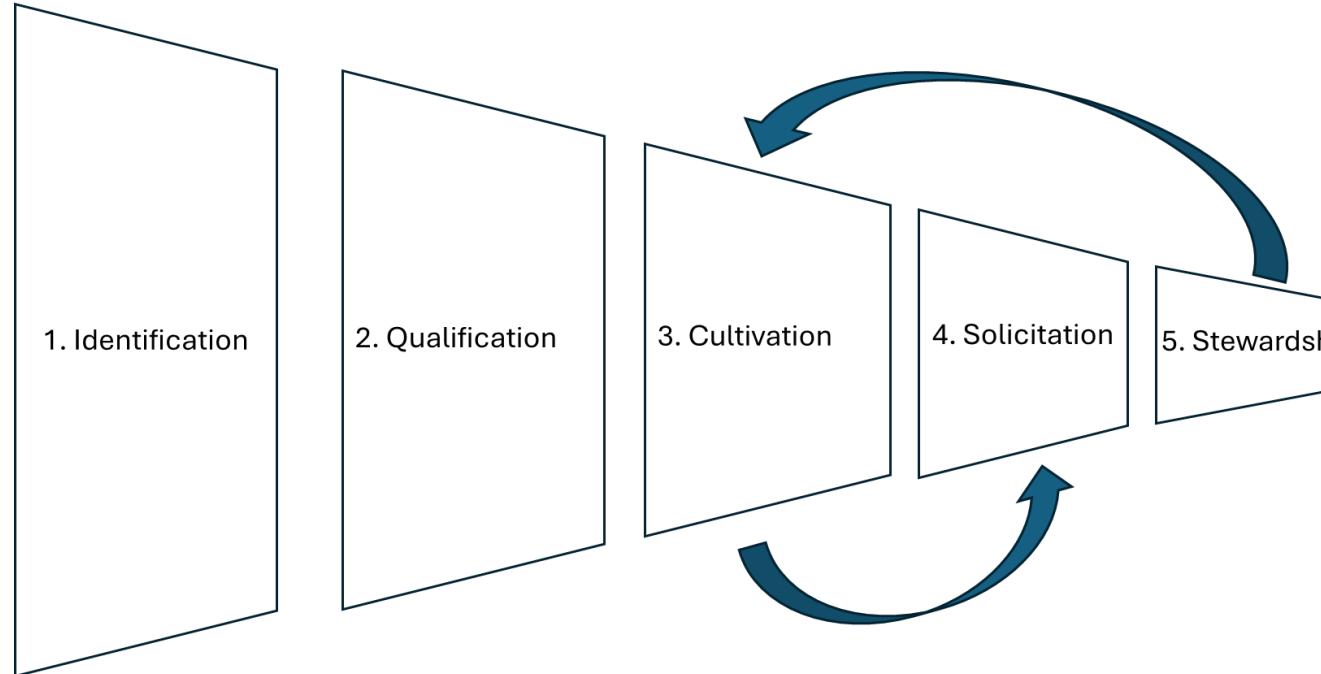
250 prospects
Value of pipeline = £1m

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



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

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

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