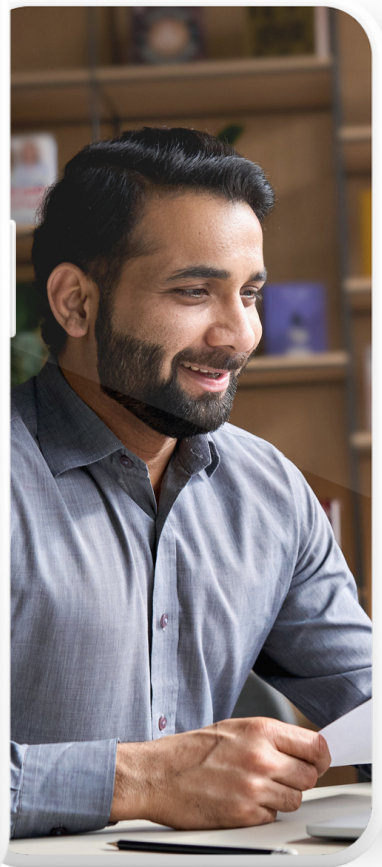HOW TO CREATE MEANINGFUL
AND IMPACTFUL DONOR OFFERS

WORKBOOK

Using the Donor Impact Portfolio process to develop
offers that speak to your donor's passions and interests
and inspire them to give generously.

The Elements of a Meaningful Offer

The creation of a meaningful, impactful, and effective donor offer isn't rocket science, but it does require three key components.

Your donor offer must present, in human and emotional terms, the following:

- A Compelling Need
- A Believable Solution
- An Opportunity for Donor Adoption

Within this framework, you need to provide a balance of statistical data and stories, depending on the preferences of your donor. Some donors prefer more of one or the other.

Throughout, you need to keep the offer focused on the donor's passions and interests, and give them a lens into the possible impact they could make if they give generously.

Identify Program Categories

In Phase 1 of our Donor Impact Portfolio (DIP) process, we work with our clients to collaborate and develop what will ultimately become the DIP Budget spreadsheet. This spreadsheet clearly shows the breakdown of program categories, program cost, % of overhead assigned to that program, amount of committed revenue, and remaining revenue need (aka "the gap").

This part of the process requires input and insight from both Program and Finance, but you can get started with some of the information you already know about your programs and your donor's interests.

In lieu of a formal process with your Program and Finance teams, use this part of the workbook to start thinking about key program categories and sub-categories that you need to know more about so you can create more meaningful offers for your donors.

Example Categories

Here are various example categories and the associated pieces of information that we gather in Phase 1 of the Donor Impact Portfolio.

Media Labs Summer Programming

- Program Info: 3 cohorts; 30 students per cohort
- Total Program Cost: $278,000
- Cost Breakdown Options:
  - Cost for student to complete one week: $775
  - Cost for one week of programming for 30 students: $23,000

Backpack Food Program for Elementary

- Program Info: 5,000 students in program; Weekly backpacks
- Total Program Cost: $465,000
- Cost Breakdown Options:
  - Cost to provide 10 students with backpacks for the year: $930
  - Cost to provide backpacks for an entire school: $7,440

Health Screenings for At-Risk Populations

- Program Info: Monthly clinics; 500 people served on average
- Total Program Cost: $329,588
- Cost Breakdown Options:
  - Cost to cover 1 monthly clinic: $27,465
  - Cover the cost of 100 people served at a monthly clinic: $5,493

Opera Camp

- Program Info: 12 weeks of camp; 20 spaces per week of camp
- Total Program Cost: $1,014,656
- Cost Breakdown Options:
  - Cost of sponsoring 1 week of camp: $84,554
  - Cost of sponsoring 1 student for 1 week: $4,227

Create Your Own

Referencing the examples shared, identify some of the key program categories you would want to share with your donors. If you have some of the program info, add it!

Action Steps

Because this process requires collaboration across your team, it's important to outline how you'll involve other groups and continue to move this process forward.

Action Steps with Leadership	Action Steps with Program

Action Steps with Finance	Other

Creating Equivalency Language

A key part of donor offers is to make the problem, and how the donor can be part of the solution, compelling and believable.

Developing equivalency language is a valuable tool to break down the large, overwhelming problem your organization is trying to address in a way that helps the donor see how they can make a difference.

An important note to remember here is that equivalency language should not and does not restrict the donor's gift. It's an illustration of impact that relates to the donor's passions and interests.

This process includes three steps:
1. Create a guidelines document
2. Identify program categories and giving levels
3. Find meaningful impact numbers and language

We recommend starting with the top categories and sub-categories that your donors are most interested in.

Equivalency Language

After you've developed your DIP Budget spreadsheet, identify the top program categories for your donors, and start there as you develop meaningful impact numbers and language.

Program Category:

Write your equivalency language here

Program Category:

Write your equivalency language here

Program Category:

Write your equivalency language here

Preparing Your Next Donor Offer

This worksheet will allow you to take what you've created and build out a plan for a specific donor offer.

PARTICULARS

	TARGET	ACTUAL
Share your target program category		
Share your target ask amount		
Share the related equivalency language		

Donor Offer Plan

In Phase 2 of our Donor Impact Portfolio process, we work with clients to develop a Donor Offer Toolkit. We recommend creating one for yourself so you have key information to easily pull from when planning out a donor offer, like we're doing here!

What is the "Compelling Need"?

What is the "Believable Solution"?

What is the opportunity for "Donor Adoption"?

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Program Information:

Outline the specific program details you want to include (stats, facts, and stories:

Equivalency Language:

Identify the specific equivalency language you'll use with this donor:

Collateral Needed:

Outline the illustrations, photos, and other materials you want to use (or will need) for this donor offer: