

# A FUTURE WE BUILD TOGETHER

IMAGINE THE POSSIBILITIES

CONNECT.  
COLLABORATE.  
UNITE.





# The Gift of Giving

Lead your donors on a philanthropy  
journey to meet their goals

A donor led strategy to uplift  
mid value donors to Major Donors

by Fleur Allen

Head of Philanthropy and Fundraising

St Hilda's Anglican School for Girls

# About Fleur Allen

**Fundraising in Philanthropy roles across sectors**

**My Philanthropic Passions**

**My Education & Experience**

CONNECT.  
COLLABORATE.  
UNITE.

FIA

WA  
FUNDRAISING  
FORUM

# Time to Share

## Find partner

What is the cause, charity or organisation  
you fundraise for  
and what is the current greatest need?

CONNECT.  
COLLABORATE.  
UNITE.

FIA

WA  
FUNDRAISING  
FORUM

# The Gift of Giving

**Philanthropy**

“philos” “anthropos”

**The Gift of Giving**

**Donor journey**

CONNECT.  
COLLABORATE.  
UNITE.

# Major Donor

Per annum and/or life time value:

Smaller organisations maybe \$1,000

In WA \$5,000 - \$100,000 pa or more

Check the annual and LTV milestones

# Fundraising across sectors

Main differences is type of engagement:

- Arts
- Welfare
- Education Advancement

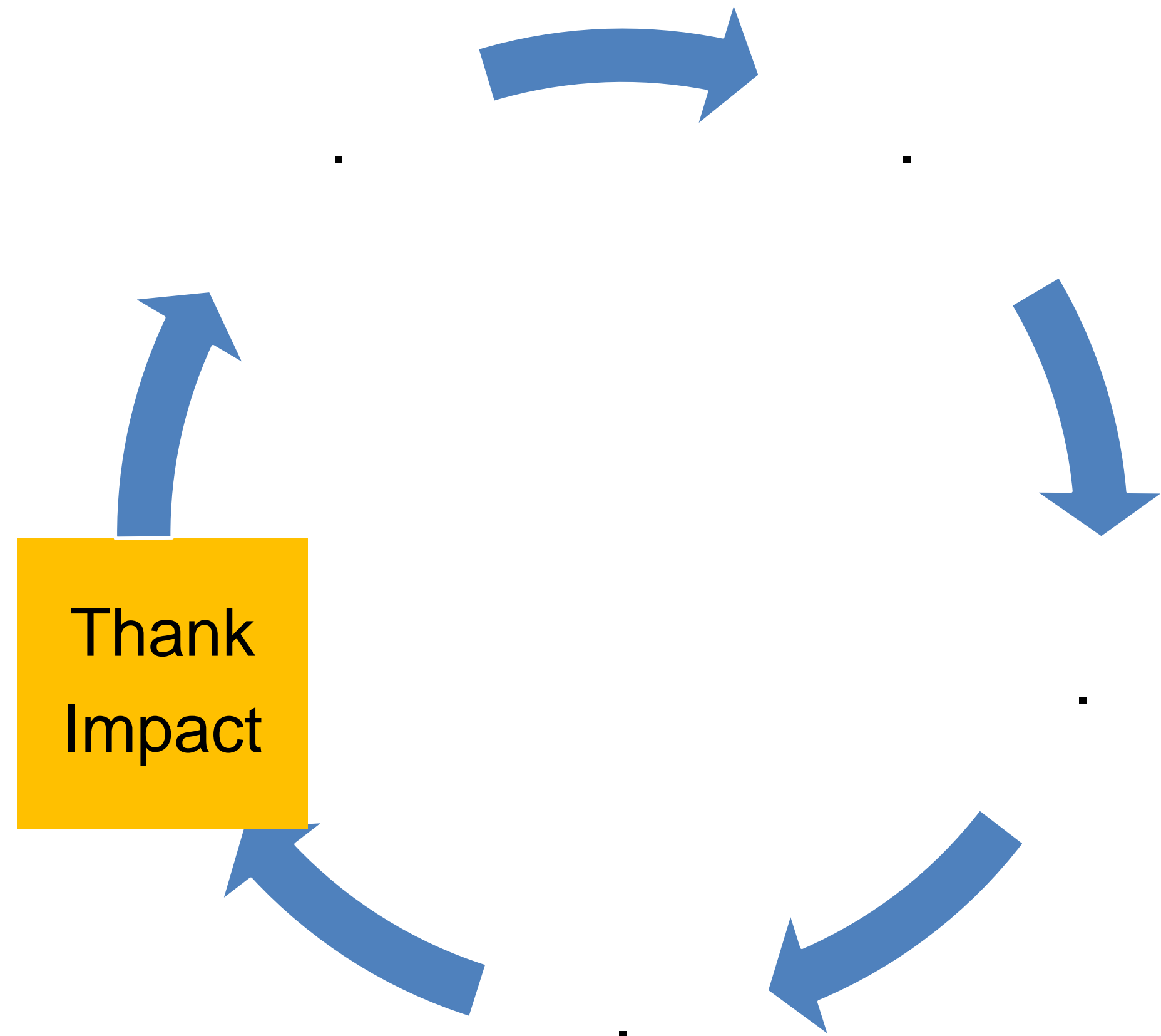
# The Donor Journey



CONNECT.  
COLLABORATE.  
UNITE.

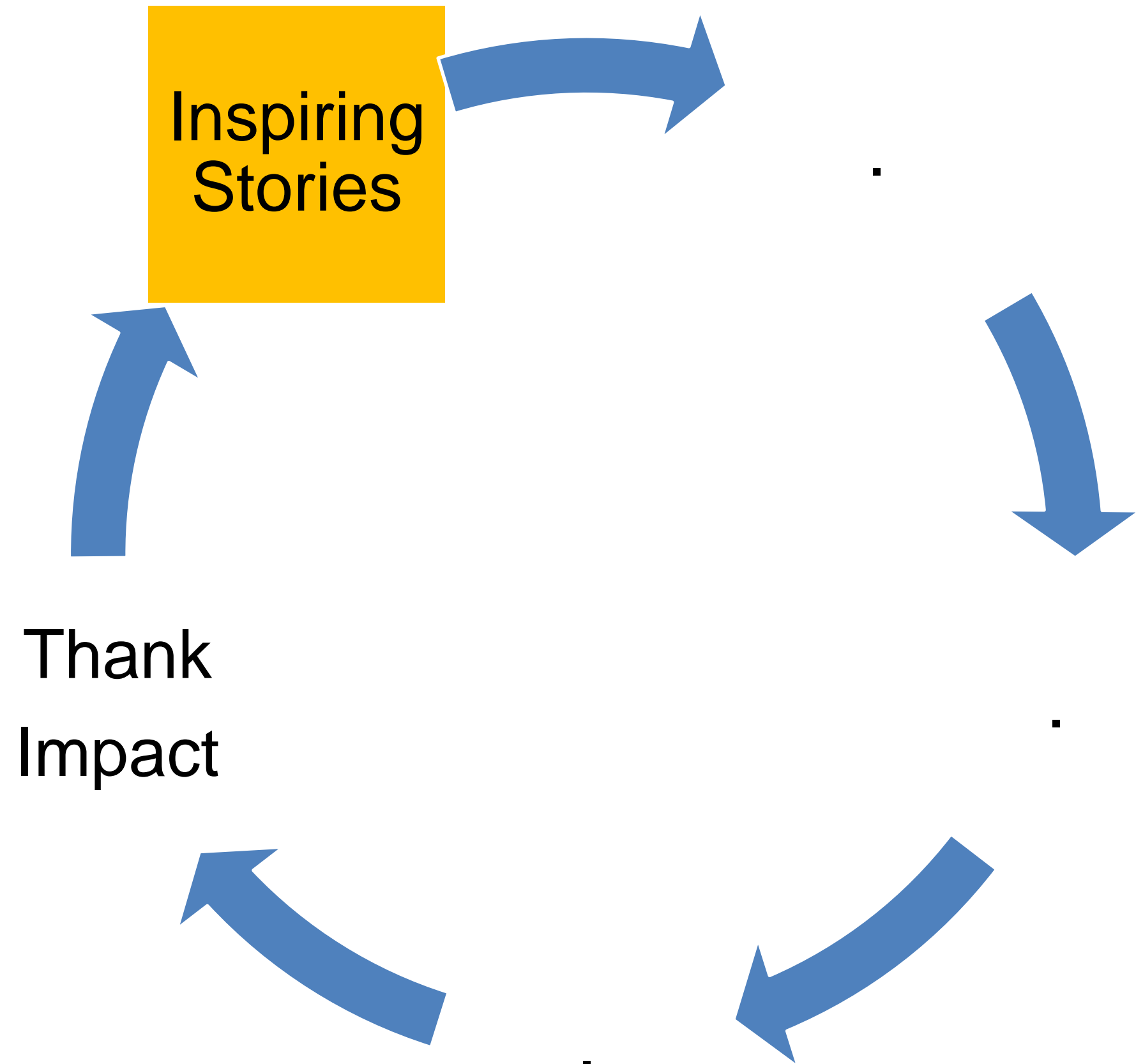


# The Donor Journey



CONNECT.  
COLLABORATE.  
UNITE.

# The Donor Journey



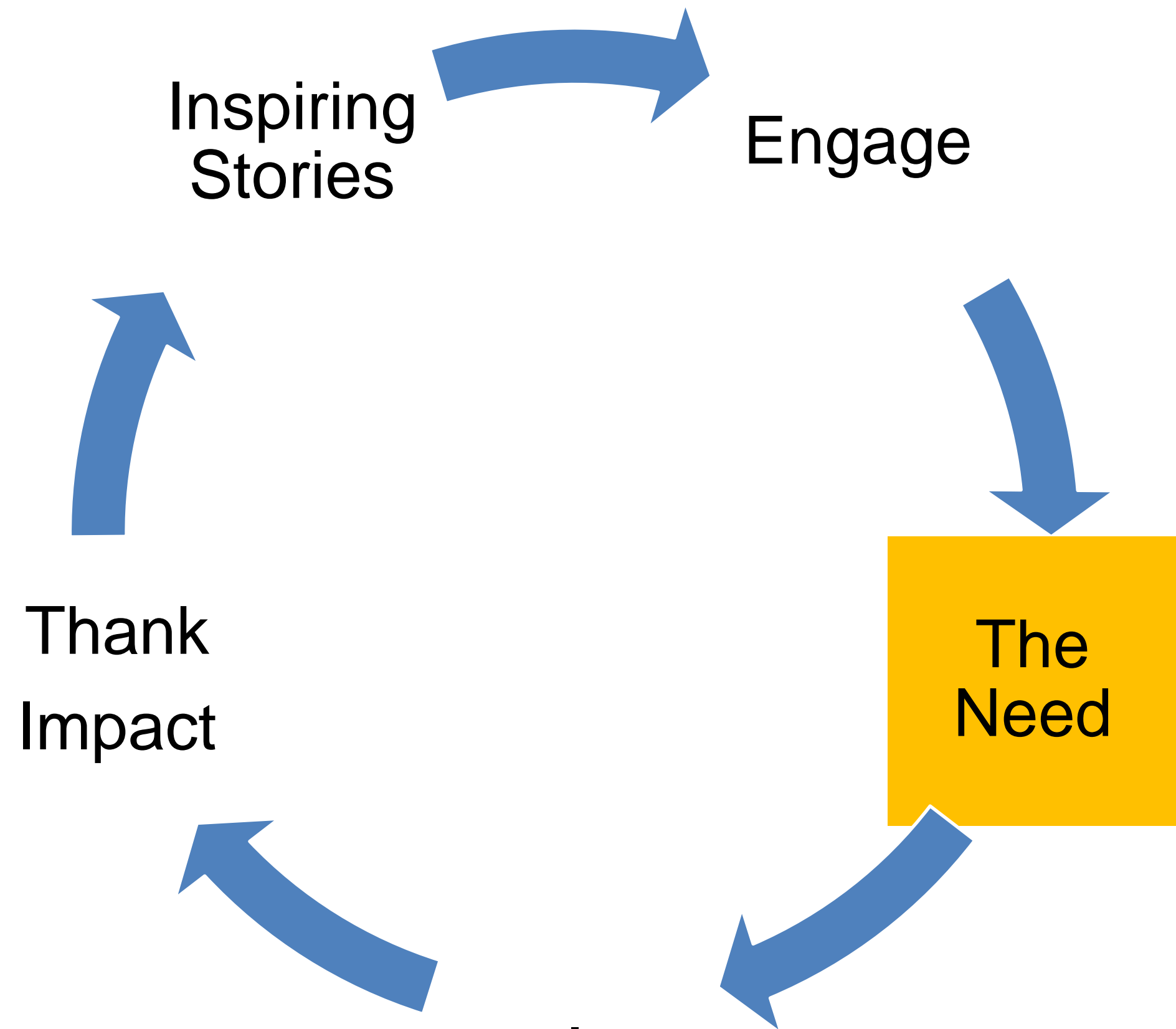
CONNECT.  
COLLABORATE.  
UNITE.

# The Donor Journey



CONNECT.  
COLLABORATE.  
UNITE.

# The Donor Journey



CONNECT.  
COLLABORATE.  
UNITE.

# The Donor Journey



CONNECT.  
COLLABORATE.  
UNITE.

# The Donor Journey



CONNECT.  
COLLABORATE.  
UNITE.

# Partnerships Manager

Part-time Partnerships Manager

Partners included:

Woodside, Wesfarmers Arts, KPMG, and stewardship of our donor base including

Major Donors and Foundations such as Lavan, Spinifex Trust, Aesop Foundation, Equity Trustees, and the Fremantle Foundation.

CONNECT.  
COLLABORATE.  
UNITE.



# Partnerships Manager

During my tenure, I increased income by 49% per annum through:

- Re-igniting lapsed Major Donors
- Attracting 3 new trusts and foundations and 2 new corporate partnerships.
- Developed a multi-tiered fundraising strategy that improved communications and created active engagement with donors, increasing the average donations received by 35%.

CONNECT.  
COLLABORATE.  
UNITE.





# The Donor Journey



CONNECT.  
COLLABORATE.  
UNITE.

# Philanthropy Manager, WA

As Philanthropy Manager for Western Australia

I worked in two national teams:

- Major Gifts and
- Trusts and Foundations, actively working to achieve and exceed multi-year and multi-million-dollar funding budgets through significant donations and grants.

CONNECT.  
COLLABORATE.  
UNITE.



everyone's family

# Philanthropy Manager, WA

In the 2020 Financial year, I exceeded targets for the Western Australian (WA) fundraising budgets by 174% for Major Gifts and 143% for Trusts and Foundations.

Example of listening and donor led

CONNECT.  
COLLABORATE.  
UNITE.



# The Donor Journey



CONNECT.  
COLLABORATE.  
UNITE.

# Head of Philanthropy and Fundraising

Income since being in my role 6 months January to July this year 75% achieved a multi million dollar capital campaign for the ESSTEAM Studio

Achieved my first 6 figure donation in this role within 6 months

Completely exceeding my goals and expectations.

From a first time donor. How?

CONNECT.  
COLLABORATE.  
UNITE.

FIA WA  
FUNDRAISING  
FORUM



St Hilda's  
ANGLICAN SCHOOL FOR GIRLS

# The Donor Journey



CONNECT.  
COLLABORATE.  
UNITE.

# Stewardship Matrix

## Thanking/Stewarding Checklists for Major Donor WA Team

### Timing

#### Targets:

- All Major Donor (MD) donations of \$2,000 or more to be thanked (as per the table below) within 5 business days of donation (10 business days in case of CEO thanking).
- All MD donations of \$2,000 or more to be receipted within 6 business days of receipt of donation
- All MD donations below \$2,000 to be receipted and thanked (as per table below) within 10 business days of receipt of donation.
- All receipting/thanking to be recorded in Connect within 3 business days of the action.

#### NB.

- The below table to be used in the context of discretion of the Philanthropy/Major Gifts Manager's understanding of the donor relationship. For example, if donating 6 figures every 6 months consider an annual phone call from CEO.
- Monthly donors are thanked at the time their Annual (end of financial year) receipt is provided.
- Top 25 – 50 Donors receive Christmas cards
- Any donors on Australia Day awards – receive a letter from CEO


Annual Giving level	Giving level name	Acknowledgement	Invitations
< \$2,000	Qualifying Prospect	<input type="checkbox"/> Short Thank You (TY) email Philanthropy Manager WA (PMWA) <input type="checkbox"/> Receipt emailed (as PDF) (email template)	
\$2000 - \$4,999	Major Donor Prospect	<input type="checkbox"/> TY phone call PMWA <input type="checkbox"/> General TY letter (no/min tailoring) signed by PMWA <input type="checkbox"/> Single page receipt letter template	
\$5,000	Major Donor	<input type="checkbox"/> TY phone call PMWA <input type="checkbox"/> Personalised TY letter signed by PMWA <input type="checkbox"/> 2 page receipt letter template (use TY image from appeal) <input type="checkbox"/> Offer Annual report and summary highlights mailed/emailed	GBTY/Graduation (NSW Converge/Momentum at MCA) events
\$10,000		<input type="checkbox"/> TY phone call PMWA <input type="checkbox"/> Personalised TY letter NM or GM <input type="checkbox"/> 2 page receipt letter template <input type="checkbox"/> Create MD Profile <input type="checkbox"/> Definition of poverty in Australia article/report	Visit (Disco Annual Rep through inv)
\$25,000		<input type="checkbox"/> TY phone call NM or GM <input type="checkbox"/> TY letter CEO sig - Personalised note on appeal <input type="checkbox"/> PMWA or follow up email letters/correspondence from PMWA <input type="checkbox"/> Create/Update MD Profile <input type="checkbox"/> Material deprivation report	Site visit (e learning clu to interests)

CONNECT.  
COLLABORATE.  
UNITE.



everyone's family

# Stewardship Matrix

\$50,000	MDVIP	<ul style="list-style-type: none"> <li><input type="checkbox"/> TY phone call NM or GM</li> <li><input type="checkbox"/> TY letter CEO sig - Personalised note on appeal PMWA or follow up email letters/correspondence from PMWA</li> <li><input type="checkbox"/> Create/Update MD Profile</li> <li><input type="checkbox"/> Logo recognition in AR (seek approval)</li> <li><input type="checkbox"/> Able to use TSF logo (on request)</li> <li><input type="checkbox"/> Invitation to volunteer (e.g. Delivery day)</li> </ul>	Thought Leadership event invitation PMWA Delivery Day
\$100,000	MD VVIP	<ul style="list-style-type: none"> <li><input type="checkbox"/> TY phone call CEO (CEO briefing prior)</li> <li><input type="checkbox"/> TY letter CEO sig personalised</li> <li><input type="checkbox"/> Follow up email from PMWA or posted note</li> <li><input type="checkbox"/> Create/Update MD Profile</li> <li><input type="checkbox"/> Optional creative elements: framed TY photo of students</li> </ul>	CEO Delivery Day WA Advisory Committee (where relevant)
			
\$200,000	Joy Spreaders VVIP	<ul style="list-style-type: none"> <li><input type="checkbox"/> Board or Advisory Committee member thank you phone call</li> <li><input type="checkbox"/> TY letter CEO sig personalised</li> <li><input type="checkbox"/> Follow up email from PMWA or posted note</li> <li><input type="checkbox"/> Create/Update MD Profile</li> <li><input type="checkbox"/> Optional creative elements: framed TY photo of students</li> </ul>	CEO invites: Delivery Day, GBTY, Events (Thought leadership), TY letters
\$500,000	Philanthropy Leader	<ul style="list-style-type: none"> <li><input type="checkbox"/> Board or Advisory Committee member thank you phone call</li> <li><input type="checkbox"/> Personalised TY letter from CEO</li> <li><input type="checkbox"/> Follow up email from PMWA or posted note</li> <li><input type="checkbox"/> Create/Update MD Profile</li> <li><input type="checkbox"/> Optional creative elements e.g. TSF Book signed by TSF staff (TY)</li> </ul>	CEO invites: Delivery Day, GBTY, Events (TY)
\$1 Million	Million Dollar Club	<ul style="list-style-type: none"> <li><input type="checkbox"/> Board or Advisory Committee member thank you phone call</li> <li><input type="checkbox"/> Personalised TY letter from CEO</li> <li><input type="checkbox"/> Follow up email from PMWA or posted note</li> <li><input type="checkbox"/> Create/Update MD Profile</li> <li><input type="checkbox"/> Optional creative elements e.g. Small function to acknowledge 7 figure milestone</li> </ul>	CEO invites: Delivery Day, GBTY, Events (TY)

CONNECT.  
COLLABORATE.  
UNITE.



everyone's family





# The Gift of Giving

Lead your donors on a philanthropy  
journey to meet their goals

Fleur Allen

[fleur.allen@sthildas.wa.edu.au](mailto:fleur.allen@sthildas.wa.edu.au)

0412 473 248

Head of Philanthropy and Fundraising

St Hilda's Anglican School for Girls

FIA

WA  
FUNDRAISING  
FORUM

THANK  
YOU.

IMAGINE THE  
POSSIBILITIES.



WA  
FUNDRAISING  
FORUM