

# Guiding Benefactors through the Different Stages of their Philanthropic Life Cycle

Michael Barvick





# Michael Barvick

## Senior Partner

- 30 years in Advancement leadership
- Raised over \$400 million in gifts
- Broad advancement experience across key sectors
- Focus on classical Catholic schools and universities

# Session Objectives

**01**

Review the Donor Life Cycle

**02**

Practical Ways to Engage with your donors over time

**03**

Understand the Stages of Moves Management

**04**

Advancement that is Donor Centered

# The Donor Life Cycle



# Entry Level



## Annual Fund

Consistent core support



## Special Events

Engagement and community



## Monthly/ Recurring Giving

Sustained,  
predictable funding

# Mid-Level Giving

**\$500 -  
\$5,000**

Gift Range



Annual Fund



Special Events



Monthly/Recurring Giving

# Engagement

- 1 Research
- 2 Referral
- 3 Self Identify



# Major Gifts

- 01 > Annual Fund/Gala
- 02 > DAF, Stock, QCD
- 03 > Capital Campaign



# Special Gift

**\$500 -  
\$5,000**

Gift Range

**Annual  
Fund**

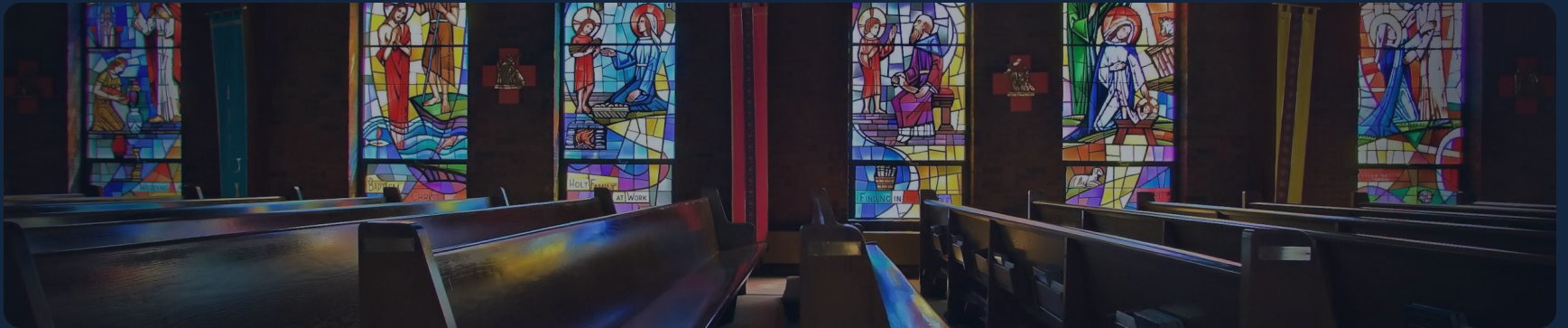
Primary Target

**Special  
Events**

Engagement

**Monthly  
Giving**

Recurring Support



# Planned Gifts

**01** > Loyalty

**02** > Age

**03** > Monthly/Recurring

**04** > Major Donors



# Moves Management



# Identification

- 1 Research
- 2 Referral
- 3 Self Identify



# Qualification



Capacity



Connection



Commitment

# Cultivation

01 > Communication

02 > Invitation

03 > Connection



# Solicitation

- Relevant
- Personal
- Specific



# Stewardship



Timely



On Mission



Personal

Q&A

# Contact Us



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