

FUNDRAISING+ SERIES BY SPEKTRIX

Fundraising + Connections

THURSDAY 5 SEPTEMBER
8-9AM PDT / 11AM-12PM EDT / 4-5PM BST



Presenters



MIRIAM WRIGHT

Senior Consultant,
Fundraising Specialist
she/her



JAKE LARIMER

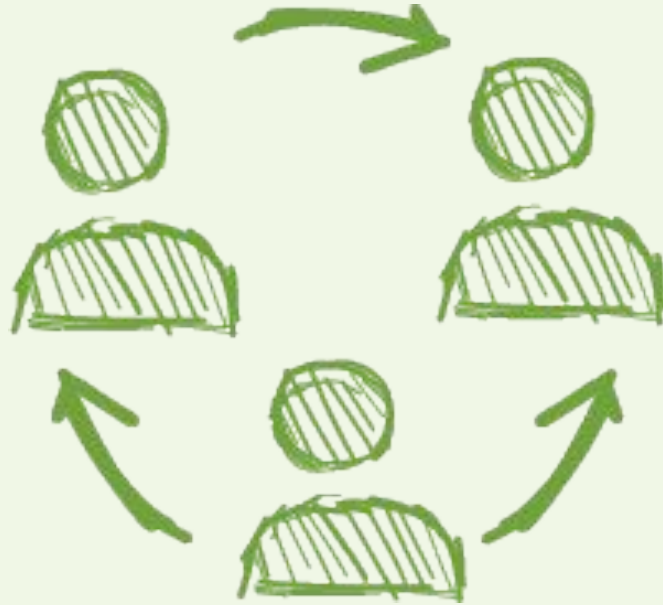
Consultant,
Fundraising Specialist
he/him



SARA STEVENS

Senior Consultant,
Fundraising Specialist
she/her

Connections



Agenda



**INDIVIDUAL
CONNECTIONS**



**BOARD OF
DIRECTORS**



INSTITUTIONS



Q & A

Individuals

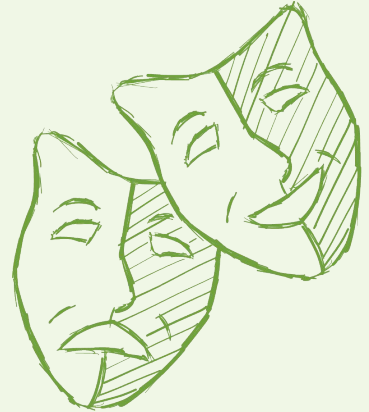


Artistic Interests

Access

Assigned Fundraisers

Previous Asks



Where is the data from?



Customer Driven

- Tickets
- Memberships
- Donations
- Mailing interactions



Fundraiser Driven

- Individual context
- Conversations
- Interests/Preferences
- Previous asks

Customer Driven Data



Choose an action: ▼

Name Prospective Capital Donors

Description

[Audit trail](#)

Drag segments to determine criteria:

Not Big Ticket Spender AND Not Postcode SW2 AND

Not Donated Before AND

OR

drop criteria here

Customer Driven Data



Portia Wright

Wallet Opportunities Pledges & Legacies **Timeline** Subscriptions Invitations



Actions

Stage Changes Pledges and Legacies Donations and Pledge Installments Invitations Memberships Merchandise

Seats booked for Aladdin 19:00
Order 24-SG-0YKJ Portia Wright
Processed by spektrix\miriamw

Fri 26/12/2025

16 months

Today

1 month

Mon 24/06/2024

1 month

Pledge Installment: Value £5,000.00 (Paid in full)

FY 2024-2025 > 2024-2025 Individual Giving > 2024-2025 Major Donors (Closed - Await Decision)

Youth Education Work

Customer Driven Data



























Tag Group

Name Access requirements

Description

On web

Tags in group:

Name	Description	Auto tag	
I'm a wheelchair user		<input type="checkbox"/>	 
I'm blind or visually impaired		<input type="checkbox"/>	 
I need to know about strobe lighting/fog/gunshots		<input type="checkbox"/>	 
I require Audio Description		<input type="checkbox"/>	 
I'm D/deaf or hard of hearing and a BSL user		<input type="checkbox"/>	 
I have a registered Assistance Dog		<input type="checkbox"/>	 
I'm D/deaf or hard of hearing and use captions		<input type="checkbox"/>	 
I need to sit within a Hearing Loop		<input type="checkbox"/>	 
I require a Personal Assistant/Companion		<input type="checkbox"/>	 
I require a seat close to an exit		<input type="checkbox"/>	 
I have an access requirement not listed here		<input type="checkbox"/>	 
I have no access requirements		<input type="checkbox"/>	 

Customer Driven Data



Other Preferences

To unlock access seats and personal assistant tickets please let us know your requirements below.

Access requirements

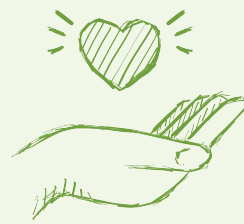
- I'm a wheelchair user
- I'm blind or visually impaired
- I need to know about strobe lighting/fog/gunshots
- I require Audio Description
- I'm D/deaf or hard of hearing and a BSL user
- I have a registered Assistance Dog
- I'm D/deaf or hard of hearing and use captions
- I need to sit within a Hearing Loop
- I require a Personal Assistant/Companion
- I require a seat close to an exit
- I have an access requirement not listed here
- I have no access requirements

Interest Groups

Which MK Gallery activities are you particularly interested in?


- Performances
- Exhibitions
- Cinema
- Music
- Family Fun
- Everything


Fundraiser Driven Data



Assigned Fundraiser: ▼

- Samantha Bagwell
- Jake Larimer
- Victoria O'Brien
- Sara Stevens
- Miriam Wright

age (JPG format) 

 **ID:** I-XC22-7Z2R

Title:

Last name: Wright

First name: Portia

Email: portia.wright+2@spektrix.com

Phone:

Mobile:

Date of birth:

Age:

Active:

Online account active:

Other Access Requirements:

Duplicate Email:

Invalid Email:

Wealth Screening Category:

CustomLink:

Job Title:

Assigned Fundraiser: Sara Stevens

Fundraiser Driven Data



Seat Occupancy details for Aladdin on December 26, 2025 at 7:00 PM

Report generated on 20/08/2024 12:43

Overview

Total Capacity	Total Sold	Total Reserved	Number of Members
1336	4	0	0

Seating Area: Lower Left

Last Name	First Name	Assigned Fundraiser	Seat Status	Ticket Type	Seat	Price
Wright	Miriam	Victoria O'Brien	Sold	Standard	A1 - A2	£69.00

Seating Area: Lower Right

Last Name	First Name	Assigned Fundraiser	Seat Status	Ticket Type	Seat	Price
Wright	Portia	Sara Stevens	Sold	Standard	A23 - A24	£71.00

Fundraiser Driven Data

A screenshot of a fundraising software interface. The top navigation bar includes 'Subscriptions', 'Invitations', and 'Actions'. A callout box points to the 'Invitations' area, containing the following text:

Also supports Spektrix Musical Theatre Company as high level donor
Loves to be invited to events, specifically any time of musical or cat-related event

Fundraiser Driven Data



Relationships Memberships Preferences

Fri 26/12/2025

16 months

Today

1 month

Mon 24/06/2024

Activity:   Conversation r.e. potential support
Casual Conversation *spektrix\miriamw*

Citizens Theatre, Glasgow



Citizens Theatre, Glasgow

“ Transparency with donors is everything, you must be **utterly honest.** ”

Mairi Rosko

Director of Development, Citizens Theatre

Citizens Theatre, Glasgow

“ You as a fundraiser are working from a **position of knowledge**. You understand how a theatre works, the risks and the processes of a capital campaign. ”

Mairi Rosko

Director of Development, Citizens Theatre

INDIVIDUAL



Family

Work

Friendship

INDIVIDUAL



Relationships



New:



Relationships



Jake Larimer works with Victoria O'brien

Importance: 1

Start Date: 1/16/2024

End Date:






Relationships



Name:

Can act on behalf of

Can act on behalf of

Default importance: ▼

Perpetual relationship

Board of Directors

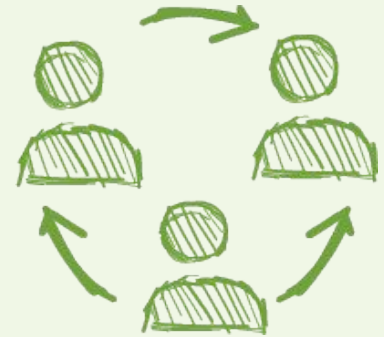
Expectations



Financial



Advisory



Connections

Diversifying Your Board

Demographics

Who currently makes up your board?

Area of Expertise

Where else can we diversify?

Barriers to Entry

Can we make our board more accessible?

Personal

- Be an Ambassador
- Bring Prospects to Events
- Strategize Next Steps





Grants

- Personal Connections
- Ambassadors
- Board Criteria



Corporate

- Matching Gifts
- Sponsorships & Partnerships
- Death in Service

Your Community

Local Businesses

- In-Kind Donations
- Auctions
- Rentals / Food & Beverage



Community Centric Fundraising

“ Nonprofits are **generous with** and **mutually supportive** of one another. ”

Nonprofits need to see and treat one another not as competitors but as **critical partners** with the common mission of strengthening the community.



community·centric
fundraising

Your Existing Donors



The Spektrix Tools

Soft Credits

Soft Credit Types

Soft Credit Types

in collaboration with

Spouse of

Purchased for











Super Friend

Matching Gift



Board Give/Get






Donor Advised Fund


Soft Credits

Details	Orders	Mailings	Wallet	Subscriptions		Actions 	
 Orders	 Merchandise	Reservations 					
 Tickets	 Donations	Print at home items 					
 <u>Donate to Support Spektrix August 20, 2024</u>				Order: <u>24-XY-0YJM</u> 1000.00 Soft credit to <u>Fake Donor Advised Fund</u>			

Soft Credits

Details **Orders** Mailings Subscriptions  Actions 

 Orders	 Merchandise	 Reservations
 Tickets	 Donations	

 24-XY-0YJM
Edited 8/20/2024 | Placed 8/20/2024

Soft credit from Sara Stevens

Give/Get Report

Run Board Get/Give- Giving History with Donations and Soft Credits

Donations with

Date Transaction Confirmed is between 1/1/2024 and 12/31/2024

and Customer

Is Active

contains all of

and Tags is

or Donations with

Soft Credited

and Date Transaction Confirmed is between 1/1/2024 and 12/31/2024

and Soft Credit Type includes

In Honor Of Employer Related to in collaboration with Spouse of Purchased for
 Doppelgänger Super Friend Matching Gift UA Soft Credit Board Give/Get Show Inactive

Soft Credit Types

Give/Get Report

Donation & Soft Credit

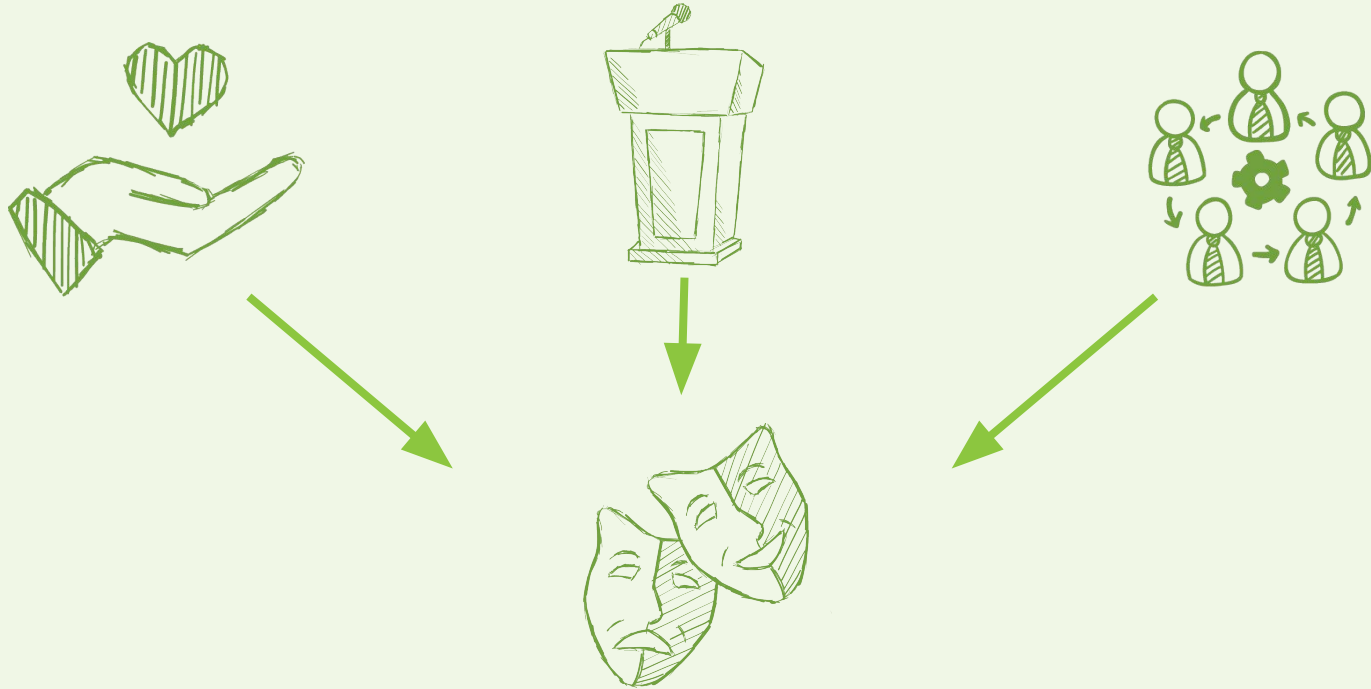
Includes transactions from 1/16/2024 to

Report generated on 8/28/2024 9:20 AM

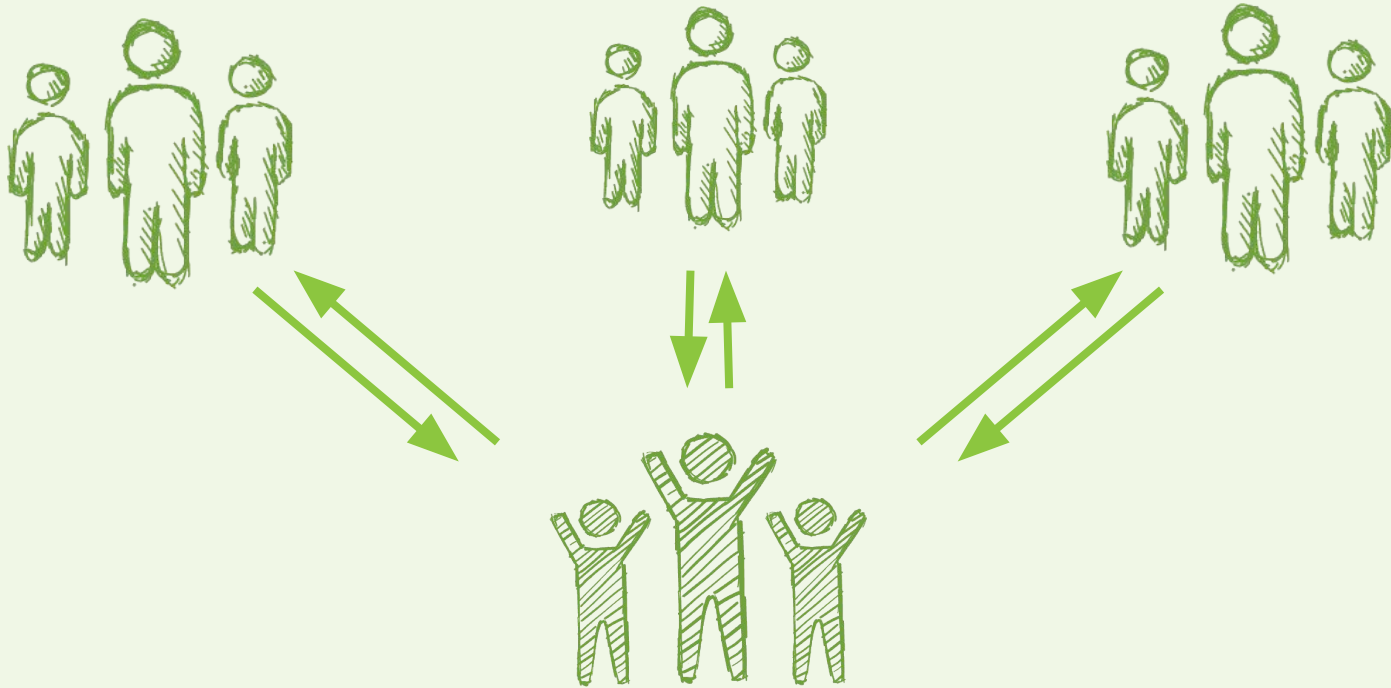
		Order ID	Date	Amount	Fund	Campaign	Soft Credit Details
Jake Larimer Number Street Way Portland, OR 97201 Total Personal Giving \$5,002.00 Total from Soft Credits \$2,500.00 Total Give/Get: \$7,502.00	Latest Gift	24-XN-0YJC	8/22/2024	\$2.00	Donate to Support Spektrix	FY 25 > Individual > Annual Fund	
		24-WQ-0YHN	7/17/2024	\$2,500.00	Donate to Support Spektrix	FY 25 > Individual > Annual Fund	Board Give/Get soft credit from Victoria O'brien
		24-WQ-0YHP	7/17/2024	\$3,000.00	Donate to Support Spektrix	FY 25 > Individual > Annual Fund	
		24-TK-0YG8	4/24/2024	\$2,000.00	Membership Income	FY 25 > Individual > Memberships	
Sara Stevens 123 Main Street Apartment 2 Austin, TX 78743 Total Personal Giving \$3,930.00 Total from Soft Credits \$1,500.00 Total Give/Get: \$5,430.00	Latest Gift	24-WQ-0YHL	7/17/2024	\$1,000.00	Education	FY25 > Individual > Education	Board Give/Get soft credit from Wally Stevens
		24-WQ-0YHM	7/17/2024	\$500.00	Summer Concert Sponsorship Fund!	FY 25 > Individual > Summer Appeal	Board Give/Get soft credit from Brittney Ventress
		24-TQ-0YGC	4/30/2024	\$10.00	Education	FY24 > Individual > Education	
		24-SJ-0YDL	3/28/2024	\$1,200.00	Donate to Support Spektrix	FY24 > Individual Giving	
		24-AQ-0E86	1/16/2024	\$2,710.00	Donate to Support Spektrix	FY24 > Fundraising events > Tickets	
		24-AQ-0E87	1/16/2024	\$10.00	Donate to Support Spektrix	FY 24 > Individual > Annual Fund	

Institutions

Granting Institutions



Granting Institutions




Key Individuals

- **Grant Administrators**
- **Local Politicians**
- **Other Arts Professionals**



Search

Spektrix Foundation 

Details

Orders

Mailings

Opportunities


Pledges & Legacies

Timeline



ID O-8J22-85KX

Name:


Phone: 

Primary contact:



Relationship Manager:

Connection:



Salutation:








used in DD Tax Receipts

Wealth Score:




Recognition Name:

Customer Search | **Spektrix Foundation**

Details		Orders	Mailings	Subscriptions		Actions ▼	
 Orders	 Merchandise	Reservations					
 Tickets	 Donations						
 <u>Donate to Support Spektrix</u> <i>October 31, 2023</i>	Order: <u>24-XN-0YJB</u> 15000.00		Facilitated by <u>Michael Geller</u>				

Relationships Credit/Vouchers Audit

Sort by: Name Importance

 Add Relationship

Hide Past Relationships

Spektrix Foundation is represented by Samantha Bagwell

Importance: 5

Start Date: 8/1/2024

End Date:

Email: spektrix@foundation.org

Phone: 555-111-1111

Spektrix Foundation is represented by Michael Geller

Importance: 5

Start Date: 1/1/2016

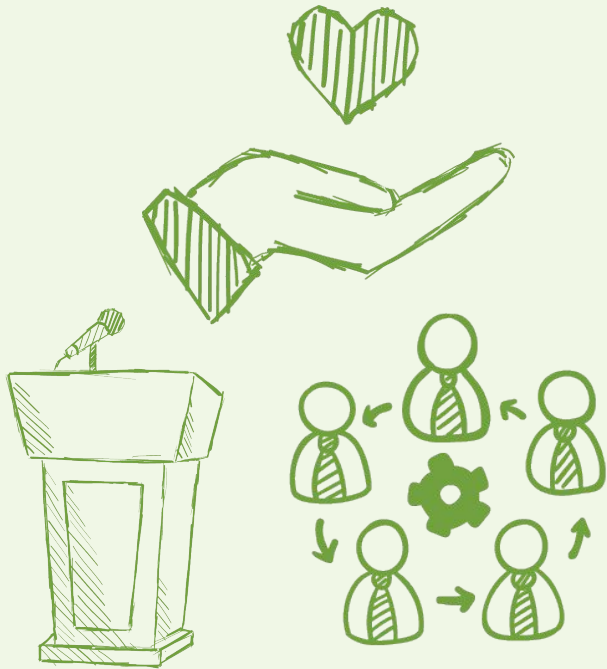
End Date: 7/31/2024

Email: spektrix@foundation.org

Phone: 555-111-1111

 Add Relationship

Institutional Priorities

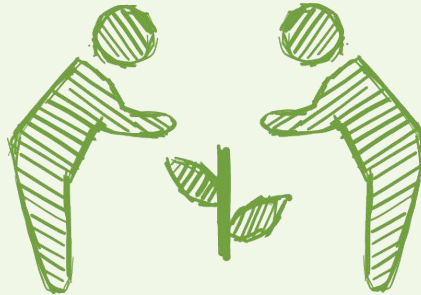


Institutional Priorities

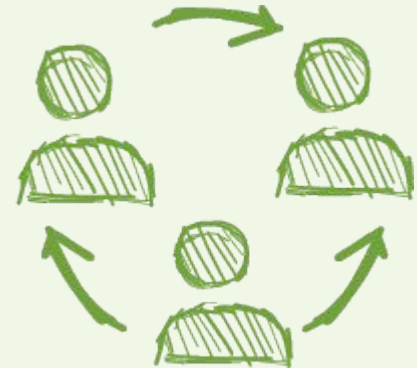
COMMUNITY



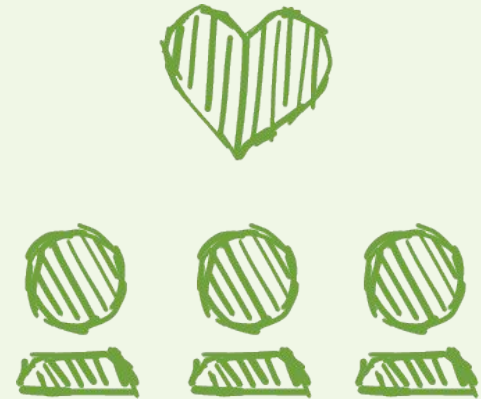
MISSION



RELATIONSHIPS



Community-Driven



Key Consideration

What existing data can show your impact on your community?



Customer List Builder

Pre-filter Main filter Output

Choose an action: 234 customers in Customer List Update count

Segment Explorer

- Booking
- Geography Filters
 - NJ Zipcodes
 - NY state zipcodes (test)

Local Segments

- Patrons Under 30
- Patrons with Oregon ZIP Codes
- Patrons Who Attended At Least 1 ...

New Local Segment

Name Local Audience Members Under 30

Description Patrons under 30 who attended our season and live in Oregon

Audit trail

Drag segments to determine criteria:

drop here to delete

Not Patrons Under 30 AND Not Patrons with Oregon ZIP Codes AND

Not Patrons Who Attended At Least 1 Show Last Year AND

OR

drop criteria here

Next


Mission-Driven



Key Consideration

Who can vouch for the work your organization does?





[Back](#) **Activity Editor** [Edit](#)

Subject: Letter of Rec Date 8/9/2024

One page letter of recommendation from Miriam Wright for our FY24 grant application to Spektrix Foundation

Type: Grant Application

Priority: Medium

Assignee: spektrix\jakel

Completed:

Time Spent +


Spektrix Foundation
FY24 > Institutional > Foundations (Cultivate)

Contacts:
Samantha Bagwell

Time Spent +

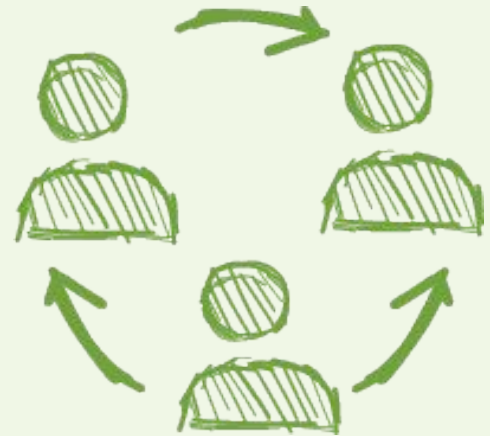
Miriam Wright

Time Spent +

[Letter of Recommendation.pdf](#)
 spektrix\jakel Today - 3:40 PM

File Limit - 20MB


Relationship-Driven




Key Consideration


How can you involve key individuals with your organization?





[Back](#) **Invitation** [Edit](#)

 [Samantha Bagwell](#)

 Cultivation Night, September 21, 2024 8:00 PM

On behalf of Spektrix Foundation

Guests invited: 2


Invitation sent on: 8/19/2024













Response expected on: 9/5/2024

Response: Accepted

Details:

Program officer for Spektrix Foundation and two guests

 Guests attending: 3

<input checked="" type="checkbox"/>	 Sara Stevens			
<input checked="" type="checkbox"/>	 Victoria O'brien			
<input checked="" type="checkbox"/>	 Samantha Bagwell			

[+ Add guest](#) [Home](#)

[Upload Attachment](#)

COMMUNITY

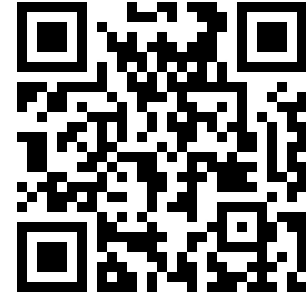
MISSION

RELATIONSHIP



Questions?

Fundraising+ Community



Register today for the last event in the 2024 Spektrix Philanthropy Series



Fundraising+ Culture

Wednesday 30 October

8-9am PDT / 11am-12pm EDT / 4-5pm BST

[REGISTER NOW](#)

SPEKTRIX

HUBS 2024

Spektrix Hubs 2024 Understanding Your Audiences

REGISTER NOW



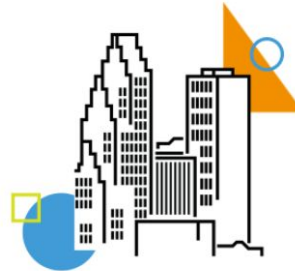
NEW YORK

**TUESDAY
SEPTEMBER 10**



CINCINNATI

**THURSDAY
SEPTEMBER 12**



HOUSTON

**TUESDAY
OCTOBER 8**



SAN FRANCISCO

**THURSDAY
OCTOBER 10**



SPEKTRIX

**Thank
You**
