

KATHERINE HARROP

Annual Donor
Age 46 years
Atlanta, Georgia
CFO, Strafford Publications, Inc.



Katherine has been interested in philanthropy and charity since college, where she volunteered for several student and non-profit organizations. She has continuously served as a volunteer since then, becoming more involved in the leadership and operations of some organizations. She began to donate more money to organizations when her employment responsibilities made it difficult for her to maintain her time commitments. Katherine tends to focus on efficiency; she prefers straightforward, concise information and practical tools to help her make decisions and act upon them. She was promoted to the CFO position at Strafford Publications three years ago; her current annual salary is \$300,000 plus bonuses. She has a BS in Literature from Emory and an MBA from the University of Georgia. She has been married for 15 years and has one daughter, age 12 years. Katherine is described by her family, friends, and co-workers as genuine, caring, concerned, gregarious, focused, and having high expectations for herself and those around her.

KATHERINE AS PROSPECT

Motivation	Philanthropic pride, altruism, tax benefits.
Drivers to Web Site	Discussions with financial planners and advisors, word of mouth from friends, references to “Donor Advised Funds” in charitable giving articles and other resources, marketing materials.
Frequency of Visits	<p>Katherine did not find the foundation Web site in her initial searches for online information, because she was unfamiliar with the term “donor advised fund.” As she learned more about her charitable giving options, she became more focused in her online research.</p> <p>Once she discovered the foundation Web site, she returned to the site several times to gather information and make comparisons against her other options. Each time she returned to the site she had specific questions and information requirements (e.g., minimum balance requirements, tax benefits, granting process, funding the account.)</p>
Duration of Visits	Katherine’s initial visit to the foundation Web site was much longer than subsequent visits; she spent approximately 35 minutes reviewing the available information and learning the site structure and navigation. Once she began comparison shopping for charitable giving options, she was much more focused and spent only 5-7 minutes per subsequent visit.

KATHERINE HARROP

Annual Donor
Age 46 years
Atlanta, Georgia
CFO, Strafford Publications, Inc.

Essential Content

- About the Fund
- History & Evolution of the Foundation
- About Donor Advised Funds
- The Seven Principles
- Charitable Gift Account (CGA) Overview
- Charitable Gift Account (CGA) FAQ
- CGA Key Considerations
- CGA Benefits
- Charitable Asset Management Overview
- Philanthropy Fund Overview
- Philanthropy Fund Key Considerations
- How To: Open an Account
- How To: Fund an Account
- How To: Grant from an Account
- Roadmap / Timeline of Process
- Checklist for Becoming a Client
- Comparison Chart (CGA vs. Private Foundation vs. Community Foundation)
- Online Newsletter Archives
- Donor Testimonials / “Real Stories”
- Recipient Testimonials / “Real Stories”
- Performance Highlights
- Contact Information
- Privacy Statement

Essential Functionality

- Cost of Contribution Calculator
- Charitable Giving Planner / Calculator
- Administrative Fee Calculator
- Charity Search
- Forms Download (PDF)
- Online Account Opening
- Newsletter Archive Downloads
- Site Search

Conversion Factors

Key information in Katherine’s decision to open a Charitable Gift Account:

- Annual tax deduction
- Efficiency of maintaining and utilizing the account
- Easy and convenient account opening process with online access

KATHERINE HARROP

Annual Donor
Age 46 years
Atlanta, Georgia
CFO, **Strafford Publications, Inc.**

KATHERINE AS DONOR

Motivation Funding the account, online granting.

Drivers to Web Site Year-end tax planning, statements and newsletters, email, requests for donations from charitable organizations.

Frequency of Visits Katherine visits the Foundation's public site infrequently. With an active account and a list of charities to which she grants money, she has little reason to visit the public site, and she is largely unaware of new or recently updated content unless specifically referred to it through her statements, newsletters, or emails.

She visits the donor site 4-6 times per year to review her account balance and status and to recommend grants.

Duration of Visits Katherine's visits to the donor site typically last only 3-5 minutes. Her infrequent visits to the public site, driven primarily by statements, newsletters, and emails, last 5-7 minutes, long enough for her to review the recent and/or updated content.

Essential Content

- Charitable Gift Account (CGA) FAQ
- How To: Fund an Account
- How To: Grant from an Account
- Topical / Situational Opportunities for Charitable Giving
- Online Newsletter Archives
- Philanthropic Resources: Books, Articles, References, Links
- Performance Highlights
- Charity Profiles
- Philanthropy Reports
- Annual Report
- Letter from the Foundation President

Essential Functionality

- Login to Donor Center
- Charitable Giving Planner / Calculator
- Administrative Fee Calculator
- Charity Search
- Forms Download (PDF)
- Email Newsletter Subscription
- Newsletter Archive Downloads

KATHERINE HARROP

Annual Donor
Age 46 years
Atlanta, Georgia
CFO, Strafford Publications, Inc.

Donor Account

Katherine maintains a low (or minimum) account balance (\$10,000) most of the year. She usually funds the account late in the year after considering her tax situation, and she distributes shortly thereafter, typically within the first 60 days of the new year. Her recent average annual donations have totaled approximately \$15,000, but her annual donations were as high as \$40,000 in the late 1990s. She would like to donate more, but she is also actively saving for her retirement and her daughter's education.

She does not request anonymous granting, but prefers to have her name given associated with the gift. She was previously a volunteer with most of the organizations, and her charitable gifts frequently serve as a replacement for the time she can no longer give to them.