



B E S T P R A C T I C E S

2021



Hartsook Best Practices 2021

Identification

- Make contact information gathering a top priority at all events, large and small.
- Regularly ask board members, staff and volunteers, “Who do you know who might be interested in our nonprofit’s mission, programs, events, campaign, etc.?”
- Ask board members to host small, VIP gatherings virtually or, if appropriate, in their homes or at a special location. Have them invite their friends and acquaintances to hear about the great work your nonprofit has accomplished. Help facilitate the events.
- Review your social media platforms for Likes, Shares and Comments from individuals who should be on your prospect list.
- Consider whether you have shared the nonprofit’s mission and accomplishments with people in your own sphere of influence. Have you asked them if they know of anyone else who might be interested?
- Even if you’ve asked board members, staff and volunteers for a list of prospect names, schedule times to meet with them one-on-one to seek their advice about who else might be interested. Initially, they may not be thinking like a fundraiser, but you are. Take the time to “peel away the layers,” and help them identify new prospects.

Qualification

- Ask board members, steering committees and fundraising leadership teams to provide valuable feedback about prospective donors.
- Evaluate campaigns from other organizations in your area. Are your prospects some of their top donors? This is another way to determine giving capacity.
- Utilize a professional service to identify high-net-worth donors listed your database.
- Wealth screening and past giving provide great insights, but one of the best indicators is information gathered from a prospect’s close friends or acquaintances—especially those who are already supporters of the nonprofit. Look for indications of donors’ and prospective donors’ interests and ability to give. Then, do everything you can to ensure your gift request matches both.
- Develop a list of questions to help surface the interest and financial capacity of new people (prospective donors) you may meet.

Cultivation

- Site visits are great, but sometimes they are not appropriate or preferred. Live, interactive virtual tours or pre-recorded video tours set to inspirational music can be powerful cultivation tools.
- Customize the donor experience with a visit from someone served by the nonprofit.
- Invite constituents and clients to board meetings to share their experiences and the life-changing services they received from the organization.
- Ask people what they’re reading. This may give you a glimpse into their interests.
- Ask first-time donors how they became interested in the organization. Give them your phone number. Tell them you want to make being a donor a great experience for them. Ask how you can best communicate with them. Personally invite them to the next event, and stay in touch between events.



- Elevate the cultivation experience with an inspirational video linked from a QR code included in the case statement.
- If donors cannot come to you, consider how to deliver an experience to them. Have a student share about an academic program; invite a vocalist to perform; bring an artifact of interest to their home to view and discuss. You don't need provide a full production. Just offer a customized experience, so they know you have listened and acknowledged their interests, and they are important to you.
- When going to visit with a major donor prospect or foundation, if appropriate, in addition to bringing a board member with you, bring a front-line volunteer or someone who has been impacted by the organization's mission. Having someone with you who can speak from firsthand experience and share an emotional connection can help prospective donors understand how they can make a positive difference.

Solicitation

- Remember to ask volunteers to give. Involvement leads to investment.
- Zoom solicitations may be new, but they can be very effective if the donor is properly cultivated and the fundraiser is thoroughly prepared.
- Personalize direct response appeals. Use words donors associate with themselves as supporters of your organization.
- When appropriate, invite a junior member of your development team to join you on a solicitation visit to listen and learn.
- Don't say *no* for anyone. It's always easy to think of reasons people won't give. But you might be surprised how many times people will surprise you if you just ask.
- Truly listen to a prospective donor. Often, they not only will tell you what to ask them for, but how much.

Appreciation

- Use holidays as a springboard for showing appreciation with thoughtful, theme-inspired gifts.
- A great way to show appreciation is a thank you letter from someone who has been personally impacted by the donor's gift.
- Don't give major donors plaques, unless they love plaques. Make sure your appreciation strategies are as unique as your cultivation strategies. Use the opportunity to let them know the relationship is real to you, too. Sometimes, a customized cat dish is a better gesture of appreciation than an expensive plaque.
- Make personal calls to ask how donors are doing—not just to make requests.
- Handwritten notes never go out of fashion, even for the smallest things: attendance at an event, acknowledging the nonprofit on social media, being a positive influence in the community, etc.



Send your BEST PRACTICES
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