

Kinetic



BEST PRACTICES

2023



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Identification and Qualification

- Ask donors to bring a plus-one to a cultivation event, and suggest they bring someone who is not already giving, but who has a similar mindset as they do about philanthropy.
- Search the donor's name, online and/or through wealth screening, to see if they have given to other organizations. If it is a family foundation, check their IRS Form 990 to see who they have made grants to in the past year.
- Think creatively about a gift. Combine ways of giving to make sure you match the request to their ability to give and level of care for your organization and/or mission. Maybe they can make a multi-year additional gift on top a multi-year event sponsorship and include you in their estate.
- Interest can be as important as capacity. If donors are giving large gifts to other nonprofits, but smaller ones to yours, they are qualified. What's needed are greater levels of interest.
- Use your donor database to its full capacity. There's a learning curve, but it's worth it.
- Know what you need and be able to explain it, clearly, before you ask.
- Be empathetic. Your cause and organization matters the most to you, but understand it is not always everyone else's priority.
- Consider your volunteers as prospective donors to be identified and cultivated. Their investments of time are clear indicators of interest and commitment.
- Identifying existing donors who could give at higher levels may be your greatest opportunity to growing giving.

Cultivation

- Communicate the need by sharing "the why," behind "the what."
- When you are communicating, the trajectory should always be upwards. Remember that your tone can uplift even when conveying stark-reality information.
- "I thought of you..." is a great opening line for a conversation or invitation to meet. Who doesn't like to be thought of? "I thought of you this morning when school started and the students walked across campus." "I thought of you today in our campaign meeting." "I thought of you when I came across this quote."
- Be patient and genuine in building trust.
- As much as possible, invite prospective donors to meet in casual settings that are more conducive to good conversation.



- Find out if there are any connections between a prospect and someone already associated with the nonprofit organization, such as a board member, volunteer, supporter, etc. Consider inviting them to join you for a casual meeting with your shared acquaintance.
- Remind yourself that the only reason to be speaking is to answer questions and encourage donors to share more about themselves and their interests.

Solicitation

- Some of the best solicitations are not perfect, but they are genuine. If you're nervous, say so. If this is your first time to ask for a large gift, admit it. Honesty works. Allow the prospect to make a connection and put you at ease.
- Be careful of the use of self-absorbed pronouns: "You" and "we" should be used in lieu of "I" and "me."
- Keep a running list of questions donors ask and make sure your answers are up-to-date and accurate. Become a walking Frequently Asked Questions expert.
- Be sure to involve any adult children in the ask, if appropriate.
- Even if you've asked many times, thoroughly prepare yourself and your volunteer leader by role playing the solicitation in a preparatory meeting before you are in front of the prospective donor.
- As appropriate, leverage board member relationships for solicitations.
- When a donor lights up about something, remember it and make a mental note. Use these insights to tie their interests to the ask.

Appreciation

- Compliment and express gratitude for a donor and their gifts in front of their community, workplace or family members. When you involve their connections, the appreciation can be more meaningful. In addition, you may meet new prospects who care about the same cause.
- A handwritten note is always valued. When email and text is so easy, the awareness that you took the time to write carries meaning.
- Invite donors to a celebratory luncheon at the location where the money will be used. For example, for scholarship announcements, combine the luncheon with a hard-hat tour or ribbon cutting.
- Pick up the phone and call a donor just to say, "Thank you."
- Personalize recognition by tying a donor's interests and preferences to your expressions of appreciation.





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