

The logo for Kinetic features a stylized white 'K' with a yellow dot on its left side, followed by the word 'Kinetic' in a white, sans-serif font.

Kinetic

Unleashing *Your* Power of Philanthropy

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Kinetic

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KineticFundraising.com



• ABOUT KINETIC

Kinetic has a long tradition of helping nonprofits of every size, scope and sector. For over three decades, Kinetic has provided fundraising counsel tailored to meet the specific needs of every organization we serve. We help our clients ***unleash their power of philanthropy*** through smart counsel and superior strategies.

We are very proud of the fundraising achievements of the nonprofits we serve. We attribute our success to our great attention to detail, with an emphasis on research and an understanding of the impact of each client's mission.

With professionals located throughout the country and abroad, we provide expertise in major gifts, development, management, estate giving, private foundation research, proposal writing, communications, executive search, strategic visioning, mentoring and more.

• **WHAT CAN KINETIC DO FOR YOU?**

Our focus on fundraising education and the advancement of the field translates to superior strategies. Our proven, research-based counsel helps ensure continued, ongoing giving success while building increased support for programmatic, expansion, capital and endowment fundraising.

Whether you are seeking professional counsel and advice for advancing your ongoing fundraising programs or planning to embark on a major fundraising initiative, ***Kinetic is prepared to help you reach your full potential.*** As a full-service fundraising consulting company, we offer a diverse range of services. Our highly skilled fundraising consulting professionals offer proven strategies based on the best experiential and quantitative philanthropic practices.





• FUNDRAISING COUNSEL SERVICES

Kinetic's fundraising counsel services are uniquely tailored to the nonprofit organization's fundraising needs during a major gift capital campaign or on an ongoing basis. In addition to fundraising counsel, we offer full-service fundraising and campaign management. In this campaign arrangement, you know your fundraising efforts are being managed and implemented with the highest level of professionalism and attention to an efficient use of resources.

Our degree of responsibility during fundraising or campaign counsel varies depending on whether we are retained to provide nonresident counsel (average of one to three days per month) or handle the day-to-day tasks as a campaign or fundraising manager (average of 10 to 16 per month). Our services to advance your fundraising may include the following:

Case Statement: We work with you to develop a compelling case statement — the vehicle through which you communicate to existing and prospective supporters your fundraising plans. As the effort continues, we facilitate the refinement of your case statement to ensure it continues to articulate your plans and reflect your success.

Prospect Identification: We facilitate and guide the identification and review of potential prospects — including individuals, foundations and corporations — for your effort. This identification process may include analyzing your volunteer and donor database and history; engaging in round table discussions; researching local, regional and/or national prospects; and utilizing the collective knowledge of the company and other public resources.



Cultivation: We strategize, plan and guide the implementation of cultivation activities for major gifts and ongoing fundraising efforts to identify prospects and broaden your base of support. These activities may occur in group settings and individually to build excitement, spread the message and create ownership among those already associated with the organization.

Solicitation: We guide the development of solicitation strategies that maximize every gift opportunity through proper research and cultivation of each prospect, role playing and strategy, and board and volunteer training. When appropriate, we participate in the solicitations with your volunteer leaders and administration or conduct the solicitations ourselves, depending on the level of service.

Corporate and Private Foundation Grants: We conduct targeted research — customized through keyword searches — to surface the best possible grant prospects for your organization. Once they're identified, we work with you to ensure that grant opportunities deemed appropriate are strategically developed, written and submitted. When appropriate, we facilitate the development of meaningful and long-standing relationships between your organization and private foundation program officers.



• FUNDRAISING COUNSEL SERVICES (CONTINUED)

Leadership Recruitment and Training: We work closely with you to identify and recruit the top-level leadership. After they are on board, we train them as needed to ensure they are prepared to help you achieve fundraising success.

Integrating Ongoing Funding: We facilitate the development of a strong ongoing operating fund while meeting your program expansion, capital and endowment needs. We continually focus on how each component affects the others as annual fundraising and other efforts, such as a campaign, progress.

Adherence to the Timeline: We maintain the momentum of the fundraising initiative, motivate volunteers and complete projects according to the established goals and objectives.

Communication Strategies: We develop a consistent message that engages constituents in your success by sharing the impact of your fundraising. The right message delivered with the right method to the right people energizes your fundraising initiatives.

Endowment Development: Endowment giving is perceived by many to be the most difficult aspect of philanthropy. We embrace this challenge and convert it to an opportunity. Endowments allow people to make gifts that support your mission, and those served by your organization in perpetuity.



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Having worked with the Kinetic team for over 10 years, I have always found them to bring structure, discipline and accountability to our work. They provide an invaluable service in equipping our board and campaign cabinet with a deeper understanding of fundraising and major gifts philanthropy. With their support, we have consistently exceeded our goals. They are great partners in philanthropy.

*– Matthew Naylor, PhD, President & CEO,
National WWI Museum and Memorial Kansas City*

• OTHER FUNDRAISING SERVICES

Campaign Planning

Often, Kinetic is engaged when an organization is considering a campaign or major gift initiative. Many organizations do not raise major gifts on a regular basis. Campaign counsel can provide confidence, experience and focused strategy to guide the success of your campaign. Before undertaking a major campaign, a pre-campaign study is critical. Kinetic's pre-campaign study focuses on ensuring ongoing funding remains the same or increases during the campaign period.

We begin by conducting an assessment. This allows us to develop a broad, research-based plan that focuses on building and sustaining relationships to power your success during the campaign and long after. This study involves the following components

Fundraising Readiness Review: We help gauge how prepared you are to achieve fundraising success. We conduct interviews with key staff and administration and review office systems and processes.

Case Statement: We facilitate the creation of a compelling draft case statement that communicates to existing and prospective supporters your vision and proposed plans.

Campaign Assessment: We gather input from external sources through personal interviews — those close to you and those you hope to engage. We help you identify potential interviewees, who offer their input in person, by phone or online. We work with you to identify a broader prospect pool, and we distribute a mail and/or online survey to obtain input.

Final Report: We prepare a campaign plan, based on the information gathered, that includes specific recommendations and a fundraising blueprint outlining the key elements of your campaign, including a recommended goal, timeline, fundraising structure, budget, staffing plan and policies. We present the study's findings and make recommendations to you and/or your leadership for approval.

Private Foundation Research and Grant Writing

We identify potential corporate and private foundation grant opportunities through specialized research and help qualify and prioritize them based on submission deadlines and your needs. One of our grant writing specialists works with those assigned to prepare a final draft for review by the executive director. If appropriate, we participate in on-site visits with funders and facilitate preparation and role playing for each visit

Board Training and Leadership Development

Our leadership training is customized to your needs. It is designed with you to unify, engage and instill confidence for your board members and leadership — whether they are seasoned fundraising veterans or new to fundraising leadership. Through preplanning and strategy discussions, Kinetic works with you to develop session objectives, outcomes, agendas, support materials and a follow-up report.

Strategic Visioning and Planning

Through strategic visioning or planning group facilitation with board members and staff leadership, Kinetic works with your organization to develop a consensus about the future of your nonprofit, allowing staff and volunteer leadership to share their ideas, insights and aspirations for the organization in an environment of shared commitment to the mission.

We begin by combing your progress to date and vision for the future, determining priorities, and outlining board committee or individual responsibility. With the support and participation of the board, the strategic visioning work lays the necessary groundwork for creating a strategic plan with specific goals and benchmarks to further your mission.





- **OTHER FUNDRAISING SERVICES (CONTINUED)**

Comprehensive Fund Development Plan

We recommend the development of a comprehensive plan to help focus operational fundraising strategies and develop tactics to support major gift fundraising, including methods of donor engagement. We begin with a focused development assessment that, (1) defines your development goals, (2) identifies potential funding sources and strategies, (3) clarifies your mission and direction, and (4) translates your vision into philanthropy. A comprehensive fund development plan ensures your communications, operating fund, fundraising events, major and bequest giving, grants and other fundraising strategies are working together most efficiently.

Executive Search

Kinetic is uniquely qualified to assess the skills, experience and potential of fundraising and nonprofit management professionals to work well within your unique culture. As your executive search counsel, we assume responsibility for all aspects of the recruitment process, including working with you to develop and finalize a position description, the placement of relative advertising and candidate screening through the recommendation of three to five finalists to be interviewed by your leadership.

While the ultimate decision is yours, we participate in the final interviews and provide feedback and advice from our unique perspective and knowledge of your organization and the field.

***Resources to Help Unleash Your Power
of Philanthropy***

Kinetic provides nonprofits with professional fundraising counsel, management and expertise, including nationally recognized speakers.

Scan the QR code to learn more.



• MEET OUR LEADERSHIP



Matthew Beem, PhD, CFRE
Chairman and CEO



Karin Cox, MFA
President



Janell Johnson, MPA
Executive Vice President
and Chief Strategy Officer



Danny Kohrs
Chief Operating Officer



Ross Pfannenstiel
Executive Vice President
and Chief Consulting Officer



Tammy Weinman
Senior Vice President
of Support Services



Jason Wood
Executive Vice President
and Chief Growth Officer



Scan the QR code to learn more about the Kinetic team.

• KINETIC CONSULTANTS WORK GLOBALLY



United States of America

| | | | |
|-----------------------|--------------------|------------------|--------------------------|
| Portland, Ore. | Tulsa, Okla. | Indianapolis | Winston-Salem, N.C. |
| San Francisco | Dallas | Columbus, Ohio | Wrightsville Beach, N.C. |
| Santa Barbara, Calif. | Columbia, Mo. | Portland, Maine | Columbia, S.C. |
| Los Angeles | Bentonville, Ark. | Boston, Mass. | Greenville, S.C. |
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International

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| Plymouth, United Kingdom | San Salvador, El Salvador |
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HARTSOOK IS BECOMING KINETIC