



BEST PRACTICES

2024



Kinetic Best Practices 2024

Identification and Qualification

- Start with your database of loyal donors and expand the circle from there. Your donors are likely to know others who care about the same things and share similar interests.
- Use wealth screenings to identify existing donors who have the ability to give larger gifts, but have not been asked to do so.
- Current and former campaign cabinet members are great resources for identifying new prospects.
- Check social media to see if there are individuals who Like or Follow your organization, but who have not yet become donors.
- Regularly ask donors and volunteers to invite their like-minded friends to an upcoming event or tour of the facility.
- Do not overlook potential prospects based on how they look or what they drive. If they are interested in the mission, they have some level of capacity to give; and you never know what that is ... until you ask.
- Have an open house or small event for donors who give at any level every time you ask. Thank them for always responding to your needs, and find out why they care. They may be prospects for larger gifts, including estate gifts.
- Refresh prospect lists by asking individuals close to the organization to list three to five people they have recently spent time with and enjoyed. These people will tend to share like interests, so it is likely that many of them might be good prospects.

Cultivation

- Start by asking question. "How did you first get involved with the nonprofit?" "What do think the organization needs to be doing in the next two years?" Listen, and remember what you hear. Then, use these insights for cultivation.
- Personalize your approach. Find out what is meaningful to a donor, and base your cultivation strategies around their interests.
- Whatever you do, make sure each cultivation activity is authentic, not derivative.
- Through organic conversations, make note of a donor's preferences. One person may respond better to statistics regarding the need, another to stories of individuals who have been helped and another to data on the nonprofit's outcomes. Optimize your cultivation opportunities with the type of information each donor prefers.
- Invite prospective donors for a personal site visit to see the work your organization does up close. Have them meet the people who will benefit from their giving and see the effects of philanthropy in person.
- Follow up a personal site visit with an opportunity for donors to express their reactions and reflections; and take every word to heart.
- Build on relationships by asking prospective donors for feedback on the organization's programs, initiatives and strategies.



Solicitation

- Whenever it is appropriate, involve board members in the process of solicitation. This will speed up their learning curve and add weight to the ask.
- With any appeal, whether written or in person, highlight the impact the organization is making, and give a clear call-to-action.
- Come equipped with facts about the projects a donor is being asked to fund. Avoid missteps by having a page of Frequently Asked Questions at your fingertips..
- Do not ask for a gift prematurely, but once the time is right, ask with confidence.
- When requesting grants, if possible, use the foundation's language to frame your project. Remember, you are helping them accomplish their mission. Demonstrate how your mission and the project requested reflects their values.
- Have an existing donor, who has a strong peer relationship to the potential donor, accompany you on the solicitation. Prepare that person to share a personal solicitation: "Would you join me in committing ..." and, then, offer a common denominator with their own gift, such as "... a five-year pledge ..." or "... a pledge of \$100,000 or more."
- Be as detailed as possible about the specifics of the activities and programming that accomplish the mission of the organization.
- Use Artificial Intelligence (AI) to get ideas and thoughts started, but always personalize your strategies. Authenticity is critical.

Appreciation

- Giving is personal; demonstrations of appreciation should be just as personal.
- Sincerity and genuine gratitude are the essential components to a great thank you.
- Handwritten, highly-personalized notes, mailed or slipped to them at the end of a coffee meeting, will never be outdated and always be appreciated.
- Call the donor as a program or project they supported is happening or has just begun. Describe what is happening, let them know you're thinking of them, and thank them again for helping to make it happen.
- Show appreciation by inviting a donor to be the special guest at a program they have supported.
- Customize your recognition gifts: an issue of the organization's magazine from the year and month the donor was born; an "anniversary" card in honor of their first gift; a plaque placed on a board "chair" after serving as the organization's board chair.
- Create a video from the organization saying, "Thank you!" It should not be over-produced; simply convey appreciation with great sincerity.





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