



## Donor Engagement Part One: Prospect Identification, Cultivation, and Solicitation

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# Philanthropic Best Practices

Effective fund development is...

The right person *asking*

the right prospect

for the right gift

for the right program

at the right time

in the right way.

# Why Do People Give?

1. To act on an emotional connection or linkage.
2. To make a difference or to change lives.
3. To respond to or support people with whom they have a connection.
4. ***Because they are asked!***

# I. Identifying Prospective Donors

# Characteristics of a Good Prospect

- 1. Capacity** is the ability to make a gift. Once you set your major gift levels for your project or campaign, you can identify the prospects who have the capacity to make gifts at these levels.
- 2. Inclination** refers to an interest in your organization, mission, or cause. A person with high capacity yet no interest in your mission is not a prospect. However, inclination can be grown and nurtured by you while capacity cannot.

Your best prospects have both high capacity and interest.

## Start with Your Own Database

- **Your Largest Donors:** Those who have given the most, cumulatively, over the last two years.
- **Your Most Loyal Donors:** Anyone who has given consecutively the last ten years with no minimum gift amount required to make it onto this list.

*These donors (the largest and your most loyal) are going to be your best individual giving prospects because they already have an affinity for the organization and are showing it by donating money.*

# Start from Scratch

Use this simple spider chart with your board and staff to identify a list of people you know who might connect to your mission. The list should include board members, former board members, volunteers, friends, business connections, and family, etc.



# Prospect Research: Where is the Information?



- Directories
- Published bios
- Reported information
- Public Records
- Political donor lists
- Fee based aggregators
- Special interest publications
- Internet searches
- Head of the MGO
- Contact reports

## Caution...

- Don't always believe the information compiled by Zoom-Info and other news aggregators
- Who's Who, Linked-In and other résumé sites are self-reported
- Not everything you find on the Internet is true, especially in social media
- Use caution when sharing common myths
- You may not want to record everything

## **II. Cultivating Prospective Donors**

# Important Tips for Cultivation

- Every donor is not alike – Know what is important to each donor and tailor your conversation to her/his interests.
- Listen more than you talk – Cultivation is a time for you to listen to the donor, ask questions, and get to know her/his specific motivations.
- Build trust – In these earlier phases of a donor relationship, it is important that you build trust between you, the prospect, and the organization.
- Focus on relationship-building – Cultivation is the time to focus on building connections between you, the prospect, and the organization.

# Develop a Cultivation Strategy

- What are your goals for the strengthening of the prospect's relationship?
- What are current connections to your organization?
- What are the ways to strengthen/steward the prospect's relationships?
- What are the opportunities to bring the prospect to experience your mission?
- What are the prospect's interests and/or hobbies?
- What are the prospect's goals for philanthropy and/or motivations for giving?
- What are the prospect's needs for support or prayer?
- What should your next steps in cultivation be?

# Cultivation Opportunities

- **Personal Visits/Calls**
  - Leadership, volunteers, development staff, program staff, peers
- **Communication**
  - Newsletters, holiday cards, letters, updates
- **Events**
  - Site visits, special events, celebrations, behind-the-scenes opportunities
- **Involvement**
  - Volunteering, board/committee participation, strategic planning, seek advice and input
- **Recognition**
  - Special/exclusive opportunities, access to leadership, access to beneficiaries of support, recognition events
- **Informal**
  - Personal phone calls, notes, emails

# Cultivation Best Practices

- Treat the prospect holistically – not a checkbook but a person.
- Get to know each prospect and find out what you have in common, especially the things that connect you to the organization.
- Meet a prospect in person – strengthening the personal relationship.
- Share information about your cause and topics that are of interest to the prospect.
- Expand the prospect's experience of your mission.
- Demonstrate impact and accountability.
- Focus on intangible vs. tangible benefits.

## **III. Soliciting Prospective Donors**

# Indicators of Solicitation Readiness

- What indicates a prospect is ready for an ask?
  - Evidence that the prospect has the capacity to make a major gift.
  - Evidence that the prospect believes in your organization.
  - Evidence that the prospect is connected in a way that would suggest that a major gift investment is the next step.

## Keys to Your Success...

- Your conviction and commitment to your mission.
- Your personal gifting.
- Your knowledge of and connection to those being asked to make a gift.

## Soliciting a Gift: Always Remember

- The people who are being invited to give care about your mission, are ready for the solicitation conversation, and they want to have a positive impact.
- Be clear and authentic. Enter the conversation with confidence and a sense of purpose.
- There may need to be several conversations with some prospective donors before they make a gift.

## Soliciting a Gift: Always Remember

- It is not the end of the world if a prospect says no. Your request may not match with each prospect's philanthropic priorities.
- Prospects will not make gifts unless they are asked. You are giving people the opportunity to invest in the future of your mission and to experience the joy of giving!

# The Conversation: Preparing for the Visit

## **Step 1: Prepare your strategy for the meeting.**

- Determine who will be present for the meeting.
- Review your desired outcome(s) for the meeting and key messages to convey.
  - **What are some of these key messages?**
  - **What do you want to know?**
  - **What information do you want to share?**
- Be clear about the ask amount.
- Determine who will say what and when (if two persons will be meeting with the prospect).
- Think about how you will respond to objections and questions.
  - **What objections/questions might you encounter?**

# Agenda for Preparation Meetings for Campaign Solicitations

Prospect: \_\_\_\_\_

Date/location: \_\_\_\_\_

Target Ask: \_\_\_\_\_

Solicitation Team: \_\_\_\_\_

## **Meeting Outline and Assignments**

**Greetings: All**

**Review of past support: \_\_\_\_\_**

- Thank You
- What past support has accomplished

**Review of donor's interest in/connection to project(s): \_\_\_\_\_**

- Family, experiences
- Other connections

# Agenda for Preparation Meetings for Campaign Solicitations

## **Review of project progress to date:** \_\_\_\_\_

- Donations/donors to date
- Importance of the project
- What the project can accomplish

## **The Request:** \_\_\_\_\_

- Who will make
- Proposed gift amount
- Proposal prepared: \_\_\_ yes \_\_\_ no
- Gift Recognition:
- Payment options:
- Planned gift ask:

## **Plan for follow up:**

# Agenda for Preparation Meetings for Capital Campaign Solicitations

## **Notes**

- Occupation
- Wealth ratings/Indicators
- Previous involvement/Experiences
- Other community involvement
- Total giving
- Last gift
- Projects supported
- Other philanthropic giving
- Family

## **Potential objections and how to handle**

# The Conversation: Preparing for the Visit

Set up the solicitation visit by telling the prospect why you are coming:

- *I'd like to meet with you to discuss some important plans that, I think, match your areas of interest.*
- *I would like to share with you our ministry goals and to offer to you some ways to help make these goals a reality.*
- *I would like your advice and expertise on achieving some specific goals that are important to our future.*

# The Conversation: Making the Ask

## **Step 2: Meet with the prospect.**

- **Opening:** Establish rapport and introductory dialogue. Talk about the prospect's connection(s) with your mission.
- View your personal meeting with a donor as a conversation. You are not there to make a presentation but rather to engage the donor in a conversation, learn about the donor, and update the donor on your organization.

# The Conversation: Making the Ask

## Step 2: Meet with the prospect.

- **Outline the case:** Explain why you are seeking support. Respond to the prospect's questions, concerns, and objections. Engage the prospect in a dialogue around the case statement and key messages that you have identified as important for this particular conversation.
  - *What do you think of this process and these priorities?*
  - *What are you trying to change and/or to preserve by your philanthropy?*
  - *How do the priorities we've just discussed fit into this plan or into your philanthropic priorities?*
  - *How can we help you meet your philanthropic goals?*

# The Conversation: Making the Ask

## Step 2: Meet with the prospect.

- **Ask permission to solicit a gift:** Ask for a specific gift.  
Then...  
BE QUIET AND LISTEN!

## Ways to Ask for a Gift

- *Given the impact our mission will have, would you consider making a gift of \$\_\_\_\_\_ to support this important undertaking?*
- *Will you join us in supporting this important undertaking by making a gift of \$\_\_\_\_\_?*
- *Joe and Mary, for these much needed projects to move forward, a number of people will need to lead the way with their giving. Would you consider being among them by making a gift of \$\_\_\_\_\_?*
- *It is crucial for you to join in our ministry through your prayer, presence, and financial support. To join us on the journey, would you please prayerfully consider a gift of \$\_\_\_\_\_?*

# The Conversation: Responding to the Prospective Donor

## Step 3: Responding to the prospect's stated intentions.

### If YES

- *Thank you very much for your support. You can be assured of our prayers and our promise to put your gift to good work.*
- *I have a pledge card with me. Would you like to fill this out now or shall I leave it with you to mail with your contribution?*

### If NO

- *Is there another amount that would be more appropriate for you?*
- *Is there a different timeframe for making a gift or pledge that is better for you?*

### If MAYBE

- *Thank you for taking the time to consider your gift. What is an appropriate timeframe for me to be in touch with you to see if you have made a decision or if you have any other questions?*

***The ask, without follow-up, will result in no gift!!***

# The Conversation: Following Up

## **Step 4: Send an email or written thank you note to the prospect.**

- Acknowledge the meeting.
- Confirm the outcome.
- Provide any additional information as promised – such as reminding the prospect of the date they committed to send in the pledge form.
- Document the visit
  - Write down notes from your meeting and then record these notes in the prospect's electronic record.
  - Make special note of your next action steps and code them for automatic reminders.

## Questions for Reflection and Discussion

- What are the most important ‘take-aways’ from this presentation for you?
- What part of this process is energizing for you and what part seems the most uncomfortable?
- Where do you need to strengthen your program: Cultivation, Solicitation, or Follow-up?

# Questions and Answers

