

# Dating Your Donors: The Do's and Don'ts



# Who am I?

Over 20 years of experience in sales, project and account management and professional fundraising.

Extensive, practical experience in annual fund management, strategy and fund development, capital campaigns, board management, event planning and major gift fundraising. With a degree in Psychology, she understands what drives people to make their giving decisions.

A member of the Association of Fundraising Professionals (AFP) since 2014 and has received her Certified Fundraising Executive (CFRE) credential in 2020. She currently serves on the Board of Directors for Big Brothers, Big Sisters of East Central Wisconsin and chairs their Gala committee, the Development Committee of the Women's Fund of the Fox Valley and is the Programming co-chair for her local AFP Chapter.

When not fundraising, Robin enjoys spending time with her family and training in the martial arts with her two children. In November 2021, she earned her black belt in karate.



**Robin Kasel, CFRE**  
Owner



# Objectives



How to research and prepare?



How to get the meeting?



Navigating the relationship

# Donor Cycle



**Identify**



**Qualify**



**Cultivate**

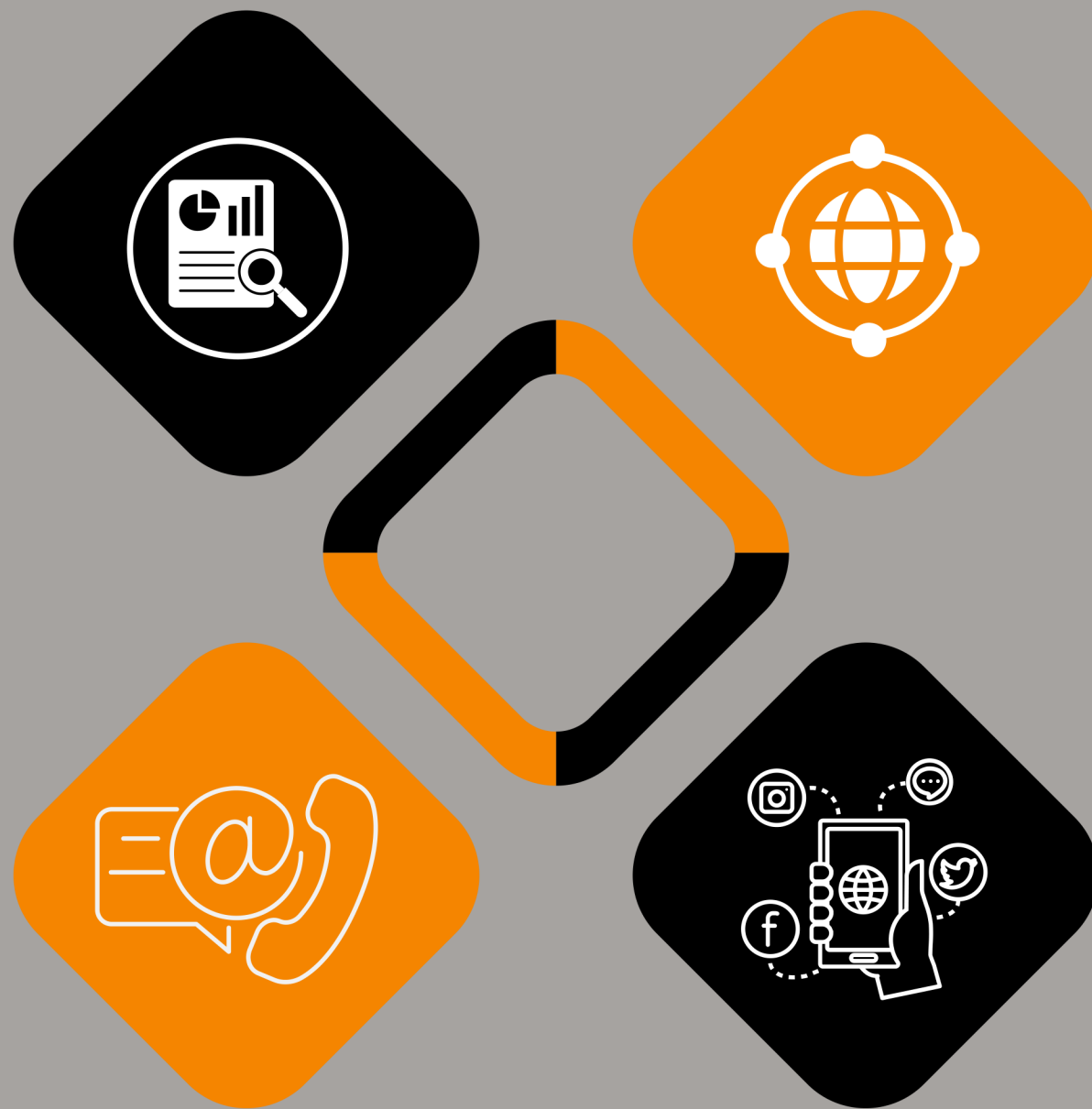
# Giving USA Report



- Individual giving is still the largest piece of the pie.
- Individual giving is declining, but there's good news.
- Relationships are key to donor retention.

# Identification

RESEARCH, RESEARCH, RESEARCH



## 990s/Annual Reports

Looking at other non-profit with similar mission's annual reports can provide lists of people and you may see some familiar names. Most likely these will be the ones well known in your communities,.

## Website

If there is a particular prospect or company you are interested in, you can look at their website, or the website where the person works to familiarize yourself with what they do. If the prospect is higher up in the company you may come across their bio which can give you personal information as well.

## Your contacts

Who does your board know? Who do your family and friends no? Warm introductions are always better than cold calls. Ask for an introduction.

## Social Media

LinkedIn is a fantastic start, so much information can be gathered. Where they work, who they know, do you have similar connections? Other platforms can also help but don't get too bogged down in this. We've all been sucked in the black hole of social media!

BUT DON'T GET STUCK ON THIS STEP!

# Qualification



## Linkage

Have they given before?  
Are they connected with  
someone at your  
organization?  
Who are your program  
participants



## Ability

Do they have the  
capacity to give?  
Wealth screening tools  
Indicators of wealth



## Interest

Are they interested in  
your mission?  
Do they give to similar  
causes?

# Scenario

You work for a local museum focused on preserving the history of the Sedona community.

One of your board members reaches out to you to ask you to meet with Frank Jackson, who owns a winery in the area. Frank is known to be philanthropic.

Let's walk through using the donor cycle.

Identification – Research

Qualification – Linkage, Ability, Interest

Frank has a net worth of \$4.4 million and gives to historical preservation causes. No one on your board knows of him directly, but Frank is very well-known in the community and his winery is very popular. Frank has 3 children, all grown and 4 grandchildren.



# Cultivation

Frank seems like a good fit, now what?



## Secure the First Meeting – Phone Call

Getting past the Gatekeeper



## Secure the First Meeting– Email

Be specific



## Capturing Attention

Email subject lines



## Use Multiple Methods

Email, Voicemail, Letters, Connect on LinkedIn, Events, Personal Visits



# Why do people give?



## **Social Proof**

Copy the behavior of others to feel like they belong



## **Reciprocity**

We're wired to return favors.



## **Commitment**

We feel compelled to uphold our commitments

# Why do people give?



## Authority

We comply with requests from people who appear to be experts.



## Liking

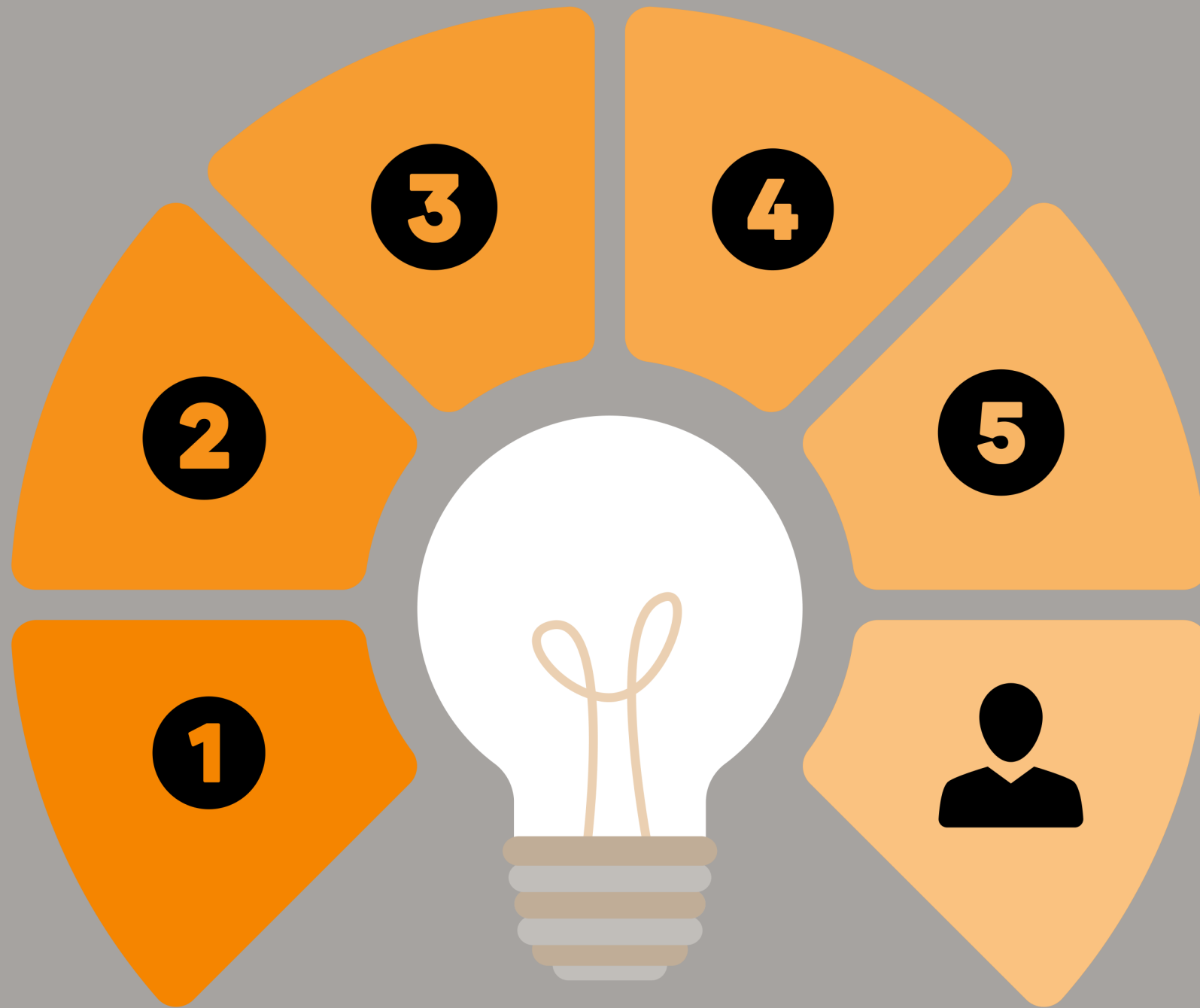
We're attracted to those who are similar to us in some way.

*Limited  
Edition*

## Scarcity

Opportunities seem more valuable when availability is limited.

# Building Trust



**1**

**Patience**

**2**

**Learn about their motives - their passions**

**3**

**We don't ask to marry on the first date**

**4**

**Persistence**

**5**

**Trust Your Gut**

# The Dance



## **DO**

- Use a variety of methods
- Keep trying
- Make it personal
- Be persistent
- Be patient

## **Don't**

- Keep talking about yourself or the organization
- Stop after a couple of attempts
- Make assumptions
- Rush to an ask

# Just like dating....

Asking the **RIGHT** person, for the **RIGHT** amount, to fund the **RIGHT** project, in the **RIGHT** way at the **RIGHT** time.



Sometimes, you get it wrong!  
But,  
**Don't Give Up!**

# When you get it right...



**Relationships  
matter!**



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