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# DONOR SOLICITATION CHECKLIST



# INTRODUCTION

For any fundraising campaign, you'll need to consider several factors before contacting donors.

Eder Organizational Investing created the ***Donor Solicitation Checklist*** to guide you through the process.

The ***Donor Solicitation Checklist*** is one of the companion tools designed to accompany the ***Resources to Develop Donor Relationships and Manage Gifts Video*** in the **Nonprofit Toolkit** training series.



# ASSESS DONOR POTENTIAL

## Research Donors' Backgrounds

- Gather information on the donor's past contributions, interests, and engagement with similar causes.

## Evaluate Financial Capacity

- Assess the donor's financial ability to contribute, considering their wealth indicators and giving history.

## Understand Donor Motivations

- Identify what factors drive each donor's philanthropy, such as personal values, community impact, and tax benefits.
- Ask donors where your organization ranks among all the nonprofits they support, from both a time and money perspective.

## Consistently Upgrade Donors

- Your goal is to upgrade *baseline donors* to *mid-tier donors*.
- Next, transition *mid-tier donors* into *top-tier donors*.
- Finally, transition *top-tier and recurring donors* into *legacy/planned givers and advocates*, which are also known as your *centers of influence*.

## Consider Gifts of Talent

- Many nonprofits benefit deeply from nonmonetary gifts, including skilled labor or professional expertise.
- These donors are worthy of your engagement and cultivation because they have the potential to make a positive and lasting impact on your organization.



# CREATE MESSAGES FOR DIFFERENT AUDIENCES



## Define Donor Types

Organize your donors by affinity, such as board members, volunteers, age group, and personality type.

## Choose Communication Channels

- Communicate with your audience using the same channels that they use without making any assumptions.
- Example: If you communicate using social media, the channel should align with the audience you're trying to reach.

## Determine Information to Share

Within your message, determine if you are telling a story or sharing data.

- Use the most appropriate methods to create support among a wide audience.
- Make your message easy to read and understand for everyone.
- Demonstrate the impact of your mission, using a combination of testimonials and available statistics.

## Share Contribution Progress

- Stress how important donors are to your organization.
- Keep donors informed about the progress of the projects their contributions have supported.





# CRAFT AND REFINE YOUR REQUEST



## Practice Your Pitch

- Talk first with friends, family, peers, or others in your organization and script your key points in advance.
- Determine the amount of money you need to request and how you'll convey the impact.
- Highlight how donations help the donor's favorite social cause, as well as the organization.
- Remember: Explain how donations will help those you serve, including addressing specific problems in your community.



## Develop Community Partnerships

- Your community likely has unique pockets of hobbies or talents that help make you truly special!
- Maybe that is a shared love of hot sauce, or enough tubas to play a concert, or a love of baking.
- How can you partner with your community to generate a fundraising event that turns your donors into advocates and fundraisers?



## Thank Your Donors

- Thank your donors in a timely manner, within a week of receiving their donations.
- Refer to our **Donor Acknowledgment Checklist** for more information.



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