



## Solicitation Briefing

**TO:** Betsy, Director of Development, and Katrina, volunteer.

**FROM:** Under Ling, MGO

**RE:** Solicitation visit with Gwen I. M. Loaded

**LOGISTICS:**

**Date:** Thursday July 11  
**Time:** 9:30am  
**Place:** Conference Room 3

### **PURPOSE: Solicitation**

We would like to ask Gwen to consider a gift of \$250,000 to support the strategic plan payable over five years and to continue her annual gifts of \$5,000 during this time. Gwen requested this solicitation visit, expressing an interest in learning about KEXP's plans for the next few years and how she might best support KEXP. We shared the strategic plan with her via email.

### **DONOR INFORMATION: Gwen Loaded**

#### **Biographical Information**

Gwen was an early employee of the XYZ Corporation. After twenty years with the company, she recently retired to dedicate her time to caring for her cat and focusing on her philanthropy.

#### **Relationship to KEXP**

Gwen has been supporting KEXP for almost 15 years, increasing her annual gifts each year. During the New Home campaign, she made an unsolicited gift of \$50,000. She has attended a number of events, including a few VIP shows and the Superconductor parties, meeting a few members of staff, including some DJs and Tom. She often emails Cheryl with requests. She has

not had any personal visits with KEXP staff. She is generally responsive to Betsy's outreach and requested this visit.

### **Giving History**

**Lifetime Giving:** \$93,460  
**First Gift:** \$500 12/31/2008  
**Recent Gift:** \$5,000 3/2/2019  
**Campaign Gifts:** \$50,000 6/1/2013

### **Information Related to New Home support if relevant**

Gwen's gift to the New Home was unsolicited. She had flown under our radar until she made this gift.

### **Contact with Tom**

As noted above, Gwen has not had any personal contact with KEXP staff beyond her attendance at events and her emails to Cheryl.

### **VISIT GOALS**

Relationship building is a series of increasingly meaningful key questions that a donor asks him/herself and which he/she needs to have answered in order to make a significant gift.

*Please note where your donor is on the **donor continuum** based on giving and engagement history. List the questions to which we must provide answers before the donor will consider a significant gift.*

Gwen is at the *Experience* stage of the donor continuum. She attends KEXP events and has met a few staff members. She makes annual gifts to KEXP and also made a significant gift to the New Home. In order to move her along the donor continuum to *Participation*, we must answer the following questions.

- Is KEXP doing a good job?
- Do I approve of the methods used to accomplish the mission?
- Am I willing and able to give more to KEXP?

**Best Possible Outcome:** Gwen is excited about the strategic plan and KEXP's future and commits to a gift of \$250,000 to support the implementation of the plan, while continuing her annual gifts of \$5,000

**Minimum Acceptable Outcome:** Gwen is excited about the strategic plan and KEXP's future and agrees to consider a gift of \$250,000 to support the implementation of the plan, while continuing her annual gifts of \$5,000

## TALKING POINTS

*Allow these conversations to flow: they may not follow the exact order outlined here.*

### Prelude

The prelude should include the following elements:

1. Brief history of how you and the donor got 'here.'
2. The agenda for the meeting
3. Request for 'buy in' on the agenda
4. Time check: confirm that the donor is available for the time scheduled.

### Socialize

- Chat about how Gwen has engaged with KEXP: VIP shows and Superconductor parties.
- Ask about what inspired her gift to the New Home

### Share Big Picture - Betsy

*Focus on the areas that seem to resonate most with the donor.*

SEGUE: We shared the strategic plan with you a few weeks ago and you subsequently asked to meet with us.

**STRATEGIC PLANNING** - As I shared in my email, we recently finalized our next four-year strategic plan which we implemented earlier this year and will guide us through 2022. We consulted with Intentional Futures and as many members of our community as possible to help us define our strategic priorities moving forward.

Our strategic plan focuses on four strategies to achieve our goals:

1. Foster a more effective and supportive organizational culture
2. Turn our commitment to racial equity into standard practice
3. Expand and evolve curation and content production
4. Extend the KEXP experience in the digital realm

*The final two strategies are aimed at helping us **inspire music lovers with meaningful experiences and original content**, whether online, on air or in person and **expanding our audience and supporter base in order to connect with more music lovers**.*

Gwen, what do you see as important for the future of KEXP? Which components of the plan resonated with you?

If Gwen asks 'how are you paying for it?', it is a cue for Betsy to respond.

### **Explore Ways to Make a Gift - Katrina**

- Gwen, we appreciate the generosity that you've shown KEXP in the past.
- As Betsy mentioned, the implementation of the strategic plan will place KEXP in a strong position to face the challenges of the next 50 years. We want to be sure to invite our longtime friends to be a part of KEXP's future with a gift to support the strategic plan.
- You can make your pledge now and spread your gift over as many as five years. And we can also work with our team to accept gifts of stock which can help donors avoid capital gains taxes.

### **Invite Investment - Katrina**

- Gwen, we would like to ask you to consider a gift of \$250,000 payable over 5 years, and to continue your annual gifts of \$5,000.

*HOLD silence while waiting for Gwen to react and respond.*

### **Listen to Response and Answer Questions - Betsy & Katrina**

**Yes:** Wonderful! Thank you so much for your commitment to KEXP. How would you like to fulfill your pledge.

**No:** Would you consider a gift of this size later? If so, when?

**If still no:** What size gift would you consider? And when might you be open to a gift discussion?