



## Donor Visit Briefing Paper

**TO:** List names of all staff, spouses and leadership volunteers who should be briefed on visit.

**FROM:** Appropriate (and all) fundraisers/event planners who will be seen by staff as being responsible for setting up and prepping for the visit.

**RE:** Simple Title that includes: Purpose of Visit (Identification, Cultivation, Solicitation, Stewardship) Activity (Lunch, Dinner, Concert, etc) with NAME OF DONORS

**LOGISTICS:**

- Date:** Day, Month Day, Year
- Time:** Visit Start Time per Style Guide Requirements (11:30am)
- Place:** Name of Location (KEXP Conference Room, Flying Fish).  
Address (if applicable)  
Phone Number (if applicable)  
Hotlink to Restaurant  
Parking Recommendations

**PURPOSE: (IDENTIFICATION, CULTIVATION, SOLICITATION, STEWARDSHIP)**

What specific outcomes are you trying to accomplish with this visit for this/these donor(s), as it relates to providing them with a deeper understanding of the goals and aspirations of KEXP.

**DONOR INFORMATION: DONOR NAME & DONOR NAME**

**Biographical Information**

Personal history, profession, wealth indicators, relationship to music, family information

**Relationship to KEXP**

Giving history and interesting information about giving, special gifts or reasons for supporting the station (tie to relationship to music if possible), favorite DJs/shows, events attended with staff or KEXP hosted events or that were meaningful to donor and donors' reactions to events.

**Giving**

**Lifetime Giving:**

\$X- Include in the lifetime giving amount, any ACTIVE unpaid PLEDGE amounts that are in the process of being paid. Add this amount (from the Pledge tab) to the total in the lifetime section of the Giving History tab to achieve lifetime giving amount.

**First Gift:** Month, Year, Amount

**Recent Gift(s):** Month, Year, Amount

Special notes about specific gifts or gift purposes made by donor.

**VISIT GOALS:**

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

Description of where frontline fundraiser has assessed donor to be on Donor Development Continuum and key questions that will be covered within Topics of Conversation Section of Briefing Paper.

**Best Possible Outcome:** Frontline fundraiser defines ideal outcome of visit for recipient.

**Minimum Acceptable Outcome:** Frontline fundraiser define minimum outcome for recipient.

**Collateral:**

**TOPICS OF CONVERSATION**

**Recipient #1 Name:**

1. Describe the person's role
2. In outline form, using full sentences, create list of speaking points for a specific staff or volunteer.
  - a. What does the donor need to hear from THIS person.
  - b. Give special instructions on examples to cover and topics of conversation to avoid.

**Recipient #2 Name:**

1. Describe the person's role
2. In outline form, using full sentences, create list of speaking points for a specific staff or volunteer.
  - a. What does the donor need to hear from THIS person.
  - b. Give special instructions on examples to cover and topics of conversation to avoid.

**Frontline Fundraiser:**

1. Will help steer the conversation and watch for areas that seem to resonate or concern the donors.
2. In outline form, using full sentences, create list of speaking points for a specific staff or volunteer.
  - a. What does the donor need to hear from THIS person.
  - b. Give special instructions on examples to cover and topics of conversation to avoid.
  - c.