

Donor Development Strategies for Major Gifts April 21, 2022

Major Donor Visit Strategy

The Basics

- Name:
- Date:
- Contact Information:
- Key Players:

Meeting Details

- When is the Meeting:
- Where is the meeting:
- Who is Attending:
- The intended outcome of the meeting:
- At the conclusion of the meeting, I want the donor to feel:

Tip: At the time the appointment is set, reinforce the importance of the meeting by indicating that you will confirm the appointment a day or two prior.

During This Meeting I Want to Share (Choose Whichever appropriate, these are only suggestions)

- Stewardship for their past gifts
- Share institutional Priorities
- Share at least 2 – “isn’t it amazing” statements

During This Meeting I Want to Learn (this is not comprehensive – the key is to write your intentions down)

- About family dynamics
- How their wealth was acquired
- Where and how they are currently philanthropic and how do they feel about it

10 Questions to Ask Before Asking for a Gift

1. Why did you get involved with the organization in the first place, and what has your involvement been? In other words, why is this organization important to you?
2. Do you have a personal connection to our mission? Can you tell me about it?
3. What do you like (love) most about the organization?
4. What would you like to see improved or changed?
5. Can you share a time when you gave to a charity and it felt wonderful? (It doesn't have to be to our organization.)
6. There are many ways to get involved (describe some). Which of those appeal to you most?
7. What are you curious about (or not understand) (or have questions about) our organization?
8. What's the earliest memory you have of getting involved with a charity? Is being involved in charitable causes an important part of your life, and if so, how?
9. In what ways could we involve your friends and family in our cause?
10. What type of legacy would you like to leave? In other words, how would you like to be remembered?

Power Questions for Major Gift Donors

1. What inspired your gift?
2. I'd love to know your story.
3. Then what happened?
4. What are your impressions of our organization?
5. What part of our work interests you the most?
6. How did you come to be so generous?
7. Ask for advice and input.
8. Could you see yourself becoming more involved in our organization?
9. If you made a major gift, what would you like to accomplish?
10. Would you like to know more about how you could impact this project?