

Eleanor Roosevelt is quoted as saying, "It takes as much energy to wish as it does to plan." Most of us would not write a foundation proposal without thought, planning, and preparation, so we shouldn't schedule a donor meeting without the same. Yet, many of us schedule meetings with donors and show up with only the donation on our mind.

With some research, thoughtful consideration of the donor's charitable goals, and a follow-up plan, you will be well on your way to creating a more effective donor engagement program.

We've put together the following donor stewardship meeting outline for your use.

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Name of Organization

## STEWARDSHIP MEETING OUTLINE

for: \_\_\_\_\_  
Name of Donor

Date: \_\_\_\_\_ Time: \_\_\_\_\_ Meeting Location: \_\_\_\_\_

People Involved: \_\_\_\_\_

*Don't underestimate the power of a virtual meeting when a donor is unable to meet in person.*


\_\_\_\_\_  
\_\_\_\_\_  
*List all staff or volunteers involved in the meeting.*

Long-Term Goal(s) for Donor: \_\_\_\_\_

\_\_\_\_\_  
*With your team, determine your organization's long-term goal(s) with this donor. That may be moving the donor along the spectrum of engagement/ giving, a potential for a planned gift, or to become an ambassador for the organization through advocacy or storytelling. Think about the relationship you want to create between the donor and the organization.*

Goal/Objective for the Meeting: \_\_\_\_\_

\_\_\_\_\_  
*What is the objective of this specific meeting? Do you want to learn more about the donor's charitable objectives, ask if the donor is willing to accept a proposal from you, or maybe it is finding out how the donor wants to be more engaged with the organization? Give some thought to how you will know if the meeting was successful.*



## Materials/Visuals/Reminders:

- Send a “looking forward to seeing you” with address or virtual meeting link, date, time of meeting, and any other preparation details 1-2 days prior.
- If meeting is occurring on site, let staff know there will be a potential donor touring the facility.
- Make sure you have water/beverages available to offer guest, if meeting in-person.
- Prepare packet and/or other items to give as a take-away.
- Prepare thank you note immediately following the meeting.
- Determine the format for the meeting.

## 1. Opening:

Lead: The person with the closest relationship with the individual should be assigned to the opening

- Welcome – small talk, catch up, learn something new about the donor(s) by asking questions.
- Confirm the amount of time the donor has to give for this meeting.
- Let the donor know why you asked him/her to meet with you – review the agenda and the objectives of the meeting.

## 2. Program Overview/Update:

Lead: The person who is closest to the organization should be assigned to the program overview.

If a programs staff person is present, this is a good section for them to lead.

- Brief overview of the program, or if the donor is familiar with the organization, highlight recent activities/new programs

## 3. The Pitch:

Lead: The person best to share an inspirational story with the donor or some information that might move the donor to action

- Tell an inspirational/impact story that is credible, tangible, and provides a “goosebump moment” for the donor.

## 4. What Will Be Different:

Lead: This section can be led by the person who just provided the inspirational story just to keep the flow of the meeting running smoothly.

- Explain “why us” (why your organization), and why you are speaking specifically with this donor. How will things be different with their support – this is the “so what?” factor.

What are your donor stewardship meeting victories or challenges? Drop us a note at [hola@cielostrategy.com](mailto:hola@cielostrategy.com)