



## Donor Stewardship Meeting Outline

Eleanor Roosevelt is quoted as saying, "It takes as much energy to wish as it does to plan." We have a lot of wishes when it comes to donor stewardship and cultivation, just think what our donor engagement would be like if we turned those wishes into intentional, individualized donor planning.

Most of us would not write a foundation proposal without thought, planning, and preparation, so we shouldn't schedule a donor meeting without thought, planning, and preparation. 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.

Use our donor stewardship and cultivation meeting outline to help you think about donor relationships. Spend some time preparing, and you will be well on your way for a successful donor meeting!

**We've put together the following donor stewardship meeting outline for you to use to prepare for your next donor meeting.**

*Name of Organization*

**STEWARDSHIP MEETING OUTLINE**  
*for Name of Donor*

Date: \_\_\_\_\_

Time: \_\_\_\_\_

Meeting Location: \_\_\_\_\_

People Involved (*list all staff or volunteers involved in the meeting*):

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**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 organization's long-term goals and the relationship you want to create between the donor and the organization.*

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**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.*

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**What are your donor stewardship meeting victories or challenges?**

**Drop us a note at [hello@burnamgray.com](mailto:hello@burnamgray.com).**

## Materials/Visuals/Reminders:

- ☐ Send a ("looking forward to seeing you") with address, date and time of meeting 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
- ☐ Prepare packet 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. If a staff person is present, this is a good section for him/her 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 story that is credible, tangible & 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.*

## 5. Questions:

**Lead:** The Donor

- *Create an atmosphere where the donor feels comfortable asking questions. Ask the donor what he/she heard that was compelling to them or what aligns with his/her charitable objectives and passions.*

## 6. The Ask for What You Want the Donor to Do Next:

**Lead:** The person closest to the individual/donor

- *Remember your meeting objective listed at the top? This is where you want to give voice to that goal. Ask the donor what you came to ask him/her.*

## 7. Next Steps:

**Lead:** Staff person or person who coordinated the meeting

- *Spend a few minutes recapping the conversation and next steps. Let the donor know you will follow up with any information requested during the meeting and/or on details that still need a bit of closure. Give the donor a specific time frame in which you will follow-up.*

## POST-MEETING PLAN:

*List what needs to be done post-meeting, including any follow up with the donor and your plan for acknowledging the donor's time, such as a handwritten thank you note.*

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