Annual Donor Call Preparation and Agenda

Preparation for Existing Donor Meeting

Before meeting with a donor, familiarize yourself with information regarding their fund (agreement, balance, type of fund, investment option), their preferences (communication method, anonymity, frequency of contact), grantmaking interests, fund goals and whether or not they have a planned gift. Also, check notes for information that may have been added since your last visit. All of this information should be recorded in their FIMS notes or at least in their fund folder.

Review their most recent fund statement, past gifts and past grantmaking. Check to see if current grantmaking is consistent with their stated grantmaking goals. Outline what you want to discuss with them. Take a note pad, any updated materials from the Foundation, information about types of gifts and their fund folder.

Meeting Script (try to make it as conversational as possible)

1. Ask them how they've been, inquire about family, and anything new in their lives. (Listen for cues: selling business, buying business, promotion, retiring, inheritance, selling property, illness, parents' death).

2. Update them on the business of CF and especially your foundation's impact in the community (number of grants made, organizations helped, people impacted by CF grants or leadership activities). Ask if they would be interested in receiving more information about anything in particular.

3. Inquire about or confirm their interest areas. If their interests correspond to any of your leadership activities, or foundation grantmaking areas, give them an *opportunity* to leverage their dollars by co-investing with the CF. Ask if they would like to review unrestricted grant applications in their interest areas that have passed your due diligence, and that you can "recommend with confidence".

4. Review prior grantmaking and determine if their recent grants fit with their strategic goals. Do they want to add or change interest areas, or do they want additional information about other topics or organizations?

5. Explore the level of impact they have had with their current funds (e.g., using grant history – dollars in each interest area, organizations). What do they want to impact – i.e., positively change - with their grantmaking in the coming year? This can lead you naturally to the next question:

6. What are their goals for fund growth in the coming year(s). Do they plan to add to their fund this year? If they have mentioned life transitions, (retirement, inheritance, planned sales of property), explain that this might be a good time to think about a tax-saving or income producing gift to the CF.

7. If they do not plan to make a gift (concerns about running out of money, uncertainty, etc.), discuss planned giving. Tell them that they are making a real difference in the community, and they can continue their legacy of philanthropy once they are gone. Let them know an estate gift is an opportunity to make a bigger gift than they ever thought possible. Tell them in general about possible kinds of gifts that would be consistent with their goals (e.g., tax-saving, income producing, life insurance they no longer need). Leave them with PG information, and avail yourself or another staff person to answer any questions they may have.

8. Ask them about their engagement with CF in the coming year – (site visits, events, peer groups, committees, volunteering). Or, ask if they would be interested in having you look into volunteer opportunities at their grantee organizations?

9. If they have a family fund, ask if they are ready to engage next gen members in the Fund.

Annual Donor Call Preparation and Agenda

Service Questions

10. Confirm their communication preferences and update contact information. Ask if they've visited your website, get their feedback, and if there is anything they'd like to see on the website. _____

11. Satisfaction questions scoring 1-5 with 5 being best:
    - Accuracy of information
    - Timeliness of staff response to calls
    - Convenience of making grants/gifts
    - Staff professionalism
    - Community information and opportunities for education
    - Accountability/Transparency of CF
    - What could we do to serve you better?_____

12. Ask them if you could contact their professional advisor to share CF information that might benefit other clients (get the Advisor name). Ask if they think any of their friends or colleagues might be interested in the services and opportunities offered by the CF. Yes or no, leave them with a folder of information to share with a referral.

13. Recap your meeting and confirm what you will be doing to follow up. Tell them when you plan to contact them next, and ask if that works for them.

14. Tell them how much you've enjoyed catching up, and thank them for taking the time to meet with you. Let them know you are available when they need you.

15. <u>As soon as you get in the car, jot down all the information you collected. When you return to the office, enter all of it into the database.</u>

Leave Behind Materials:

- CF Updates Document (This information can also be used on website)
- Copy of Fund Statement
- Grant History Report (Grants since the inception of the fund)
- Planned Giving Materials

Referral Information Packet

- Foundation Brochure (including website info)
- DAF Services Sheet
- Your business card