

# Preparing for and Optimizing Donor Visits

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*Lives That Speak:*  
The Campaign for  
Haverford

## WHERE TO BEGIN?

### **Donor Record**

Print out the donor record and jot notes on front page

### **Paper File**

An asset that should never be ignored.

### **Scour the Internet**

Zillow, Trulia, LinkedIn, Facebook.

### **Imagine yourself at a dinner party or on an elevator**

Develop questions. Uncover the obvious. Momentos?

### **Goals for Visit**

Building trust, laying the groundwork for philanthropic involvement and impact, and securing another visit (note: rarely a gift)





# The Donor Preparation Worksheet *by Delta Plus*

*Prospect Name:*

*Meeting / Call Date:*

*DEP Stage:*

*Desired Outcome:*

Prelude	Reminder of how we got“here”:  Duration:  Agenda   Red flags to address:  Buy-in:
30-Second Commercial	
Questions & Talking Points	
What to Avoid	
Potential Outcomes	



Prospect Name: Milt Diamond

Meeting / Call Date: January 12, 2015

DEP Stage: Engagement

Duration: 30 minutes

Desired Outcome: Agreement re purpose of newly created CPGC Endowed Scholarship Fund

<b>Prelude</b>	<p><b>Reminder of how we got “here”: phone call in 1/10; introductory meeting in 2/14, when learned of interest in the Center for Peace and Global Citizenship (CPGC). Email with concept paper. At 11/14 meeting, Milt posited \$200,000 on 50<sup>th</sup> and need to discuss designation and to move forward on commitment.</b></p> <p><b>Agenda / Red flags to address: Milt has a geographic interest in three specific countries; stress that for the CPGC ISSUES more important than GEOGRAPHY and so seek partnership in helping students/faculty understand refugee issues.</b></p>
<b>30-Second Commercial</b>	<p><b>1.Olga to express thanks for contribution in support of AF and class totals!!!!</b></p> <p><b>2.Olga to express thanks for intended newly created endowed scholarship, to reference concept paper and to introduce colleague/executive director (ED)to discuss details.</b></p> <p><b>3. ED to explain why ISSUES are more important than GEOGRAPHY and to ask re Concept Paper.</b></p> <p><b>4. ED to explain how Fund might be used in first year and beyond. Cool kid= ‘62</b></p> <p><b>5.Olga to ask re purpose, name, funding timeframe and perhaps present draft Gift Agreement.</b></p> <p><b>6.Next steps- meet in CPGC over Reunion</b></p>



<b>Questions &amp; Talking Points</b>	<ol style="list-style-type: none"> <li>1. ED to answer questions re Concept Paper and CPGC.</li> <li>2. ED to note that refugee issues are of increasing interest to students, faculty research, and the CPGC is poised to facilitate experiential learning through dedicated funding.</li> <li>3. Newly created endowed fund could in first year alone make possible: workshop with world-renowned expert in refugee issues; summer internships re refugee issues; Winter Break to Mexico/AZ border; on-campus MEIS events.</li> </ol>
<b>What to Avoid</b>	<ol style="list-style-type: none"> <li>1. Leaving without agreement on purpose and name of new endowed fund.</li> <li>2. ED's passion taking over conversation such that quiet Milt does not speak.</li> </ol>
<b>Potential Outcomes &amp; Next Steps</b>	<p>Milt is inspired by ideas in Concept Paper and by ED's presentation to review and agree to Gift Agreement (with minor edits) so that it may be formalized in 1/15 and funded in 2/15</p>



Not psychic...prepared!



# Preparation Principles Checklist *by Ron Shapiro*

Challenges you face

Situation Summary

Objectives

Precedents

Alternatives

Interests

Strategy/Next Steps

Timeline

Team

Script

Who has time for this?!!



Preparation leads to a gift that leads to donor impact that leads to success that leads to...



Thorough preparation ensures that ... you always are poised for productive conversation/s that lead to phenomenal gifts (as in \$100 to \$1M)

... you control some of the variables

... you maximize each encounter

... you build confidence (=eliminate self-doubt)

... you experience success, which breeds success



## References:

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