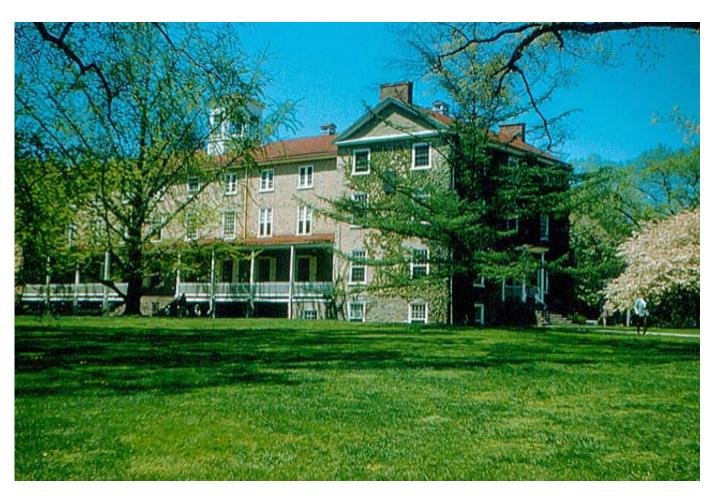
Preparing for and Optimizing Donor Visits

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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)

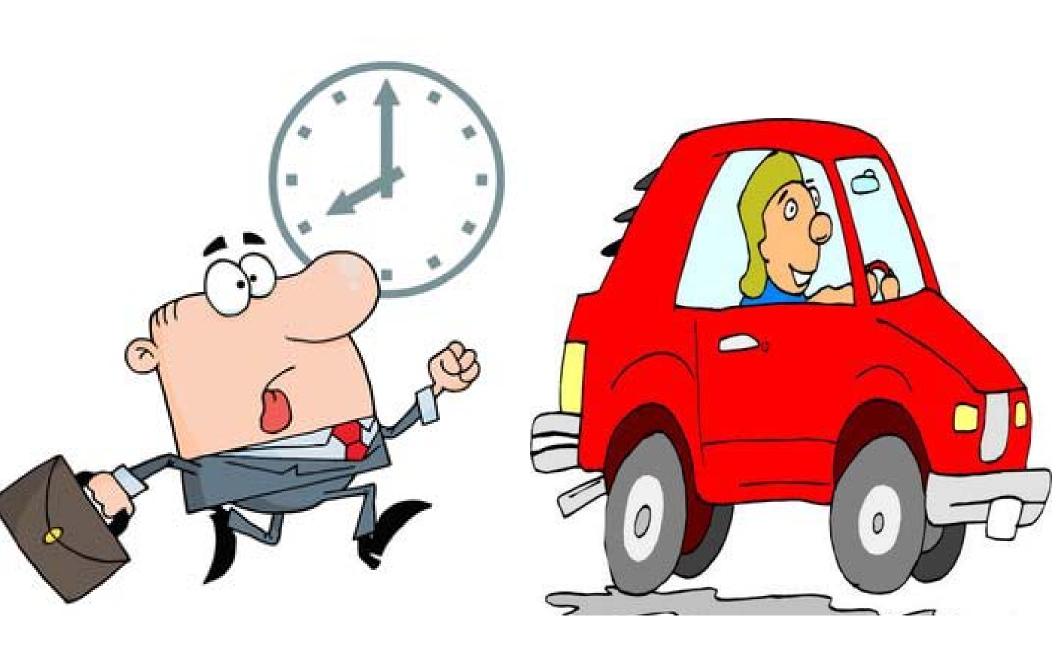




The Donor Preparation Worksheet by Delta Plus

Prospect Name:	Meeting / Call Date:
DEP Stage:	
Desired Outcome:	

	Reminder of how we got"here":
	Duration:
5	Agenda
Prelude	
	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

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 th and need to discuss designation and to move forward on commitment.
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.
1.Olga to express thanks for contribution in support of AF and class totals!!!!
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.
3. ED to explain why ISSUES are more important than GEOGRAPHY and to ask re Concept Paper.
4. ED to explain how Fund might be used in first year and beyond. Cool kid= '62
5.Olga to ask re purpose, name, funding timeframe and perhaps present draft
Gift Agreement.
6.Next steps- meet in CPGC over Reunion

Questions & Talking Points	 ED to answer questions re Concept Paper and CPGC. 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. 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.
What to Avoid	 Leaving without agreement on purpose and name of new endowed fund. ED's passion taking over conversation such that quiet Milt does not speak.
Potential Outcomes & Next Steps	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

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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