

# Guidelines for a great fundraising meeting

Ten Steps to fundraising success – the most important is number 6!

## 1) Prepare for the meeting:

- ➔ Obtain and read information about the donor – particularly their funding priorities.
- ➔ Develop a list of goals for the meeting:
- ➔ Explaining your organization's mission and what it does.
- ➔ Preparing a list of potential project proposals that might fit with the donors priorities.

Prepare materials for the meeting – an annual report, brochure, project case study?

## 2) Introduce yourself:

- ➔ Thank the person for meeting with you.
- ➔ Confirm the amount of time the individual has allocated for the meeting.
- ➔ Introduce what you do, your organisation's programmes and priorities, state the purpose of the meeting: "discussing how we might be able to work together". Check with the donor that they agree with this purpose.

## 3) Set the scene: "what are your general and specific areas of funding interest?"

ask 1-2 general questions to build trust and understanding of the donor's priorities.

## 4) Actively listen to their responses, check you understand their priorities. If you are unclear ask!

## 5) What might they fund you to do?

General areas of shared interest and specific project suggestions. Having confirmed donor's funding priorities, suggest areas where they might fund your organisation. Also raise specific projects you would like to do but don't currently have the funds for.

## 6) In terms of specific funding: what might we be able to do together? You must ask this question in order to progress to point 7!

## 7) Reach an agreement on next steps – what will you do as follow up? Thank them for meeting you and agree to provide them with further information if needed.

## 8) Create a file of "donor profiles" and record summary information of each donor in terms of contact person, funding priorities and potential

**specific applications you might make including who will be responsible for this and when it will be done.**

**9) Share information with colleagues within 24 hours – fundraising is everyone’s priority.**

**10) Follow up with a thank you note.**

**→ Reconfirm the next steps and express how much you are looking forward to working with them in the future.**