fundsforNGOs
Grants and Resources for Sustainability
PREMIUM

# A Short Guide

# on

# How to Conduct Successful Donor Meetings

# Introduction

One of the most important yet the most neglected activities of your fundraising effort is scheduling a personal meeting or visit to the donor. Many times organizations totally miss on setting up personal meetings and instead rely on organizing group events (fundraising events, lunch, conferences, bulk emails, tours, etc.) to cultivate donors. This, however, is not a healthy practice. Just like any relation needs a personal touch and time to grow, you also need to invest time in meeting donors for developing a cordial work relationship with them.

Donors are the backbone of your organization, without their support it will be difficult for you to sustain your projects and achieve the mission of your organization. There is no denying that a personal connection in the fundraising process can help you build a stronger case for your organization. These days people emphasize on new methods of fundraising like the use of the internet, telephone, and crowd funding but no matter how much technology progresses, face to face meetings are still the best way to raise funds. These interactions are the best way to communicate with donors regarding causes you care about and also to help you to understand donors' viewpoint and their interests.

This guide will help you in getting out of the comfort zone and setting up meetings with donors like a pro. So hesitate no further, just follow the simple steps and master the art of donor meetings.

The guide has been divided into three sections:

1. Planning the Meeting
2. Conducting a Successful Meeting
3. Convincing Donors to Support Your Cause

## 1. Planning the Meeting

Engaging donors and developing long term relationship with them is often a challenge for most organizations. Taking tiny little steps and understanding the importance of each step will ease out the process of donor meetings and will surely help you in the long run.

- **Develop a donor map:** If you do not have a donor database, create it today. Random donor searches consume time and resources, resulting in little success.
  - Shortlist donor agencies: This short listing can be done by visiting the donor webpage and seeing what they fund. This particular step does not require you to carry out detailed research but it is just a preliminary search done to identify donors who have some relevance to your area of work.
  - Donor profile of shortlisted donors: Once you have a list of relevant donors, conduct in-depth research and create a donor profile. As each funding agency has its own guideline and priority of funding, get an understanding of what type of project they fund and how they fund it. The donor profile should have details of the grant cycle, funding mechanism, application procedure, funding volume, geographical and sector priorities and complete contact details.
  - Diversify your donor search: While compiling donors for your database, don't just look for conventional funding agencies. There are several new donor mechanisms in place viz. virtual funding platforms, crowdfunding, CSR, individuals, etc. Keep an eye on such funding windows as there is a huge potential to get funds from them. You can categorize the donors into several types like Corporate, Multi-lateral, Bi-lateral, Foundation, Trust and Individuals, etc.
  - Regularly update and monitor the database: Once the database is created the real work starts. The database will be useful only if you regularly update it and check it on a regular basis, this will ensure you not missing any important deadline and engaging with multiple donors in a constructive way.

- **Prioritize donors whom you would be meeting:** It will be very difficult to set up a meeting with all the donors; it is, therefore, advisable for you to prioritize the donors who you will be meeting in the next few months. You can prioritize these donors, basis the active donor calls, past support of donors, existing contact with the donor, etc. You should initially focus on agencies that are currently funding or with whom your organization already has established contacts.

- **Know your donor:** Make sure you have done your research about the donor; this will help you identify the areas where the donor is willing to invest and also the likes and dislikes of the donor. Approaching a donor without proper research will only lead to a wasted opportunity. This will also impact your future interactions, as they may consider your organization to be a non-serious entity. While conducting research focus on the following areas:

- Interests of the donor
  - How do they support organizations
  - Existing organizations that are supported by them
  - Philanthropic history
  - The process of engagement with them
  - Preferred communication method (emails, letters, calls, face to face meetings etc.)

- **Developing contact with prospective donors:** Remember, the first impression is often the last impression, so be very careful while you communicate with donors. Being professional right from the beginning will help in creating a worthy image and will lay the foundation of a strong relationship. When initiating contact with a new donor, ensure that you have done proper research and have identified areas where you can avail funding.
  - Get introduced to the donor through your board/volunteers/directors.
  - Introduce your organization and highlight your flagship projects, by sending an introductory mail.
  - Take the help of your board member to seek an appointment for a meeting or a call with a donor representative.
  - Communicate with them professionally and try to gain information regarding funding possibilities or get the details of the officer-in-charge. Once you get the chance to speak with a donor representative make the most of the opportunity.

- **Develop a better understanding about your own organization:** Yes you read it right; before you make the donor aware about your organization you should be fully prepared and well aware about your own organization. This can be done through one of the following ways:
  - Go through your entire website.
  - Read the registration documents, membership records and other official documents.
  - Have a meeting with your project staff to understand about the various projects and their current situation.
  - Read annual reports of the last two years.
  - Organize a small workshop where the board members, founders, volunteers, and other staff can share their stories and field experiences.
  - Go and meet the beneficiaries of the various projects and if possible collect some first-hand stories from them.

- **Set up the meeting:** Once you've found the donor that you would like to approach and are clear with the purpose of the meeting, schedule the meeting. To schedule a meeting, simply write a mail stating that you are from XYZ organization and would like to meet them. This should be followed-up with a phone call to arrange for a suitable time and place for the meeting.

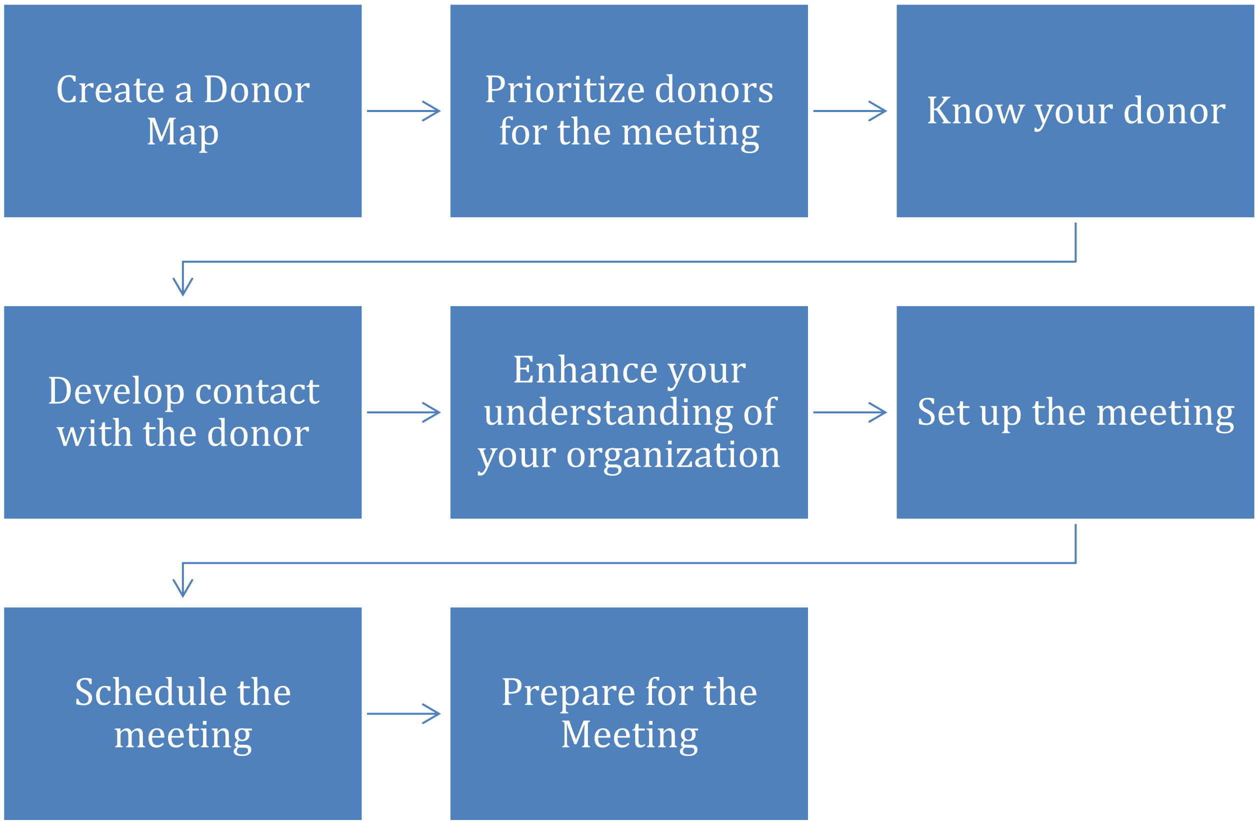
  While setting up the meeting, it is important for you to have a clear objective and agenda for the meeting. It is important for you to have a clear purpose before setting up the meeting. Discuss with your project staff and board members about the need to meet the donors. Some of the reasons for which NGOs meet with donors are as follows:

- Updating them about the existing projects.
- Briefing them about the latest developments within the organization.
- Inviting them for some event/membership drive etc.
- Seeking support from them.
- Getting their feedback/advice on existing projects.

Looking at the list, you might think that you don't have to personally meet the donor for any of the reasons cited above and you can easily send a mail instead. But remember, personal connection strengthens your case and thus you should not leave any opportunity to build up the relation and what better way than meeting the donor.

- **Preparations before the meeting:** To create a positive and professional impression on the donor, it is important to be thoroughly prepared for the meeting. Some key points to keep in mind are:
    - Identify the objectives of the meeting.
    - Prepare a folder that carries important information (data, case studies, financial information).
    - Create simple yet visually appealing presentation.
    - Create a list of questions for the donor.
    - Jot down a small paragraph about the organization that highlights your organization and clearly describes the mission.
    - Keep your stationery (notepad, pen, pencil) ready.
    - Ask a board member, senior colleague to join you for the meeting.
    - Preload the necessary information on your laptop or tablet.

## Process Flow for Planning the Meeting



## 2. Conducting a Successful Meeting

All your hard work has finally paid off and the donor you had been chasing has given you a slot for a face to face meeting. You are one step closer to raising funds for your organization. This is the time you had been waiting for; make the most of it by keeping in mind the following points:

- **First Impression Counts:** As you enter into the room to meet the prospect, ensure that you give the best impression. Be confident and give a warm smile followed by a firm handshake.

- **Be positive and initiate conversation:** Once all is settled, starts a generic conversation with the prospect.

- **Be Confident when you speak:** When discussing your organization, you have to be passionate and at the same time very confident of the things that your organization does.

- **Carry organization brochure:** You won't be able to explain everything about your organization during the short meeting, in which case it is a good practice to provide the donor your organization brochure. Do not overload the donor with bulky reports, data, and other documents; just share some promotional material to help the donor understand your organization better.

- **Explore:** The first few meetings with the donor will be exploratory in nature, which simply means that during these meetings your primary agenda is to extract as much information from the donor as possible. Discuss their needs, ask questions and take notes.

- **Learn to listen:** Be a good listener and let the prospect speak about their passion, interest and other stories. It is important for you to hear the details so that you can develop a case of support that matches the donor's interest. Be attentive and interested in what the donor speaks.

- **Share your success stories:** Now that you have gained a fair idea of what the donor is looking for, share examples of how your organization deals with some of the problems that are close to your donor.

- **Answer the questions:** Try to answer the questions of the prospect in an honest way. If there are questions that you are not prepared to answer, politely ask them for time and take a note of these questions.

- **Keep track of time:** Respect the time that was allotted to you. In case if you feel that the meeting is going in a positive direction, just politely ask the prospect if you can take a few more minutes before wrapping up.

- **Wrap Up:** Wrap up the meeting nicely. Thank the prospect for their time and leave the meeting with a smile.

- **Follow up:** Once the call/meeting comes to an end thank them for giving time, this can be done by sending them an email, immediately after your meeting. The follow-up mail should start by thanking them for their valuable time. If they have asked for some information, provide it immediately or give a timeline for you to provide the information. Also, try to set the tone for the next meeting.

- **Continue to cultivate the donor:** Even if you do not get a very positive response after the meeting, try to keep in touch by inviting them to your workshops, seminars, etc.

## Key Pointers for a Successful Meeting

- Follow Basic Etiquettes:
  - Dress Appropriately
  - Use the right salutation
  - Be Punctual
  - Communicate Properly
- Be precise and to the point when introducing your organization.
- Do not start an unending monologue
- Avoid asking questions for which answers are available on their webpage and guidelines.
- Be confident and calm
- Listen to the donor patiently
- Respect the schedule, if you have been allotted 20 minutes (stick to the 20minutes time frame)
- Look interested, no matter how boring the conversation might be, there should be no sign of disinterest.
- All the material to be shared during the meeting should be free from all grammatical, technical and factual errors.
- Do not rush immediately to make the ASK.

## 3. Convincing Donors to Fund You

Once the donor has shown interest in your proposition, and has agreed to meet you again for a discussion, be ready with a proposal/case for support. This proposal should provide information on what you intend to do, what are the objectives, key activities, how will it help the cause, how much money you need etc. As there are several organizations applying for funding, you need to develop a strong case to avail the fund. Make sure that the proposal is in line with the priorities of the donor and within the allocated budget.

Along with a strong case for support you also need to keep in mind the following:

- **Groom the Relationship:** Once introduced, rather than asking donors to meet up for presentation and asking them for funds one can invest time in building the image further. This can be done by inviting them to volunteer work, or by taking them on board as an advisor, or by having them to attend your events. Grooming the relationship with the donor helps in engaging with the donor and helping them to understand your organization better. Just a word of caution, do not overburden your prospect with emails, greetings and invites.

- **Communication:** Whenever contacting a donor make sure to follow proper protocol and professionalism.

    - Maintain a proper channel of communication: Let a single person take lead in all communication with a particular donor, this practice reduces confusion and helps in building a relation.
    - Make sure that all communication with is done by a staff member who has good communication and interpersonal skills.
    - Do not waste time in writing long emails; always be concise and to the point.
    - Do not send random email, messages or calls to the donors.
    - Keep a calendar for follow ups: Create a calendar showing details of the communication and response you received from a donor.
    - All the communication should be error free.

- **Enhance your visibility:** The chances of your organization getting funded are very much dependent on how visible are you on the web. In today's time when everything is just a click away, it is essential that your organization is on the internet. It is equally important to make your presence felt in the public domain.
    - Attending workshops and seminars: Workshops and social events are an excellent way to develop linkages as they provide an opportunity for networking.
    - Sharing your case studies and success stories on social media: Social media is a brilliant medium to showcase your efforts to a large audience. If your efforts have brought positive changes you should let people know about it.

- Regularly updating your webpage: It is very likely that if the donor likes your proposal, they may check your details on the net. It is thus necessary that you regularly update the webpage so that all your latest information is available.

- **Write a convincing case for support:** Once you have collected information about your organization and donors, develop a case. You should select one particular project/area of work which needs immediate attention. Collect all data and facts related to the particular project which would include: demographic details, geographical location, activities, and financial requirement, etc. Remember it:
  - Should be attractive
  - Should be donor centric
  - Should clearly illustrate your funding requirements
  - Should showcase your accomplishments
  - Should convince the donors to engage with your organization

  Be very clear of how you will use the fund; all donors want to know what percentage of money is being used for directly the cause and what is being used for management purposes.

- **Solicitation:** The final step in donor cultivation is to solicit funds. By now you already know your donor preferences, the amount of money he may donate, the causes which the donor is most keen to support etc. Make use of the information available and approach the donors with a customized request. There are a number of ways through which you can solicit fund viz. by sending a letter of enquiry, telephone fundraising, volunteer support, online crowd funding campaign etc. Make the entire process of donation easy by offering multiple options for making donations. You can accept checks, monthly memberships, online donations, etc.

- **Acknowledge your donors:** Send thank you messages, share the names of your supporters in blogs, web pages and newsletters, this motivates donors to continue their support.

- **References are Important:** It is important to provide references, so that donor is confident before funding your organization. The donor would want to make sure that your organization is ethical and professional before committing to any funding.

## Important Steps for Donor Meetings

**Planning**

- Identify the donor
- Prepare well for the meeting
- Know your Donor

**Meeting**

- Create awareness
- Develop donor interest in your organization.

**Convincing**

- Donor cultivation and engagement
- Solicitation

**Get Funded !!**



April 16, 2019