Handout 6.5: Dos and Don’ts in Donor Meetings

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| **Do** | **Don’t** |
| ✓ Plan what you want to achieve from the meeting beforehand✓ Find out as much as you can about the donor and discuss your work that falls within their interests ✓ Dress smartly✓ Arrive on time and keep within the time allocated✓ Find out more about the donor✓ Ask questions about their current areas of interest ✓ Be prepared to answer questions about risks, impact, participation, sustainability and accountability ✓ Provide information on your vision, approach and experience✓ Prepare notes and project outlines to give to the donor at the end of the meeting✓ Explain how your work complements the work of others and what is different about it✓ Be natural✓ Stick to what you know, and get back to donors when gaps in your knowledge occur✓ Take your business card or full contact details ✓ Think carefully about who should go to the meeting to ensure that you can confidently answer a range of questions✓ Keep your questions and answers as clear and brief as possible✓ Sensitively gauge how much your contact(s) know about the area of work that you are discussing with them and pitch the conversation accordingly✓ Address everyone from the donor organisation taking part in the meeting, especially those who are the most sceptical and important to win around✓ Keep the conversation focused on what you have planned for it, particularly if the meeting is short✓ Make sure that actually ask for anything that you planned to ask for✓ Leave the meeting with a clear next step such as a pledge to submit a proposal or a date for a further meeting | × Be vague about the purpose of the meeting× Try to give the whole history and scope of your work when there isn’t time to do it× Go directly to the meeting from the field × Keep the donor waiting or save the important issues till the end when there is no time left× Criticise the donor’s work× Ask questions to which they have already provided answers in previous communications× Make statements without backing them up with examples and case studies from your own experience× Waste the donors time with minutiae and unnecessary technicalities× Burden your contact with papers at the start of the meeting that distracts them from listening to you× Criticise the work of other organisations as a way of demonstrating what is unique about yours× Be forced ×Try to bluff it or provide conflicting information× Write down telephone numbers on scraps of paper× Overwhelm the donor with too many visitors× Forget your audience, be too technical or use unnecessary jargon× Assume they know nothing … or everything × Focus only on the most ‘friendly’ person in the group× Get side-tracked× Finish the meeting without having achieved something, even if it is to get to know each other better× Leave issues unresolved |