****

**THE CHRONICLE OF PHILANTHROPY**

5 Things to Do Before Your

First Meeting With a

Major-Gift Prospect

** Do your research. For example:**

**Want to be better organized?** Visit philanthropy.com/resources for details about this and other tools.
Copyright © 2015 The Chronicle of Philanthropy

* Has the donor given to your organization before? If so, how much, how often, and for how long?
* What is donor’s philanthropic history with other organizations?
* Has the donor volunteered for your organization or attended any of your events?
* Do any of your board or staff members know the donor?

** Prepare good questions for the meeting. Sample questions:**

* Why are you involved with our organization?
* How do you want to be involved?
* How did you come to the decision to give in the first place?
* What makes you continue to give?

** Determine who should attend the meeting**

** Plan for the time you have
 Set goals. For example:**

* Thank the donor for past gifts.
* Get to know the donor better.
* Find out what level of giving the donor would consider going forward.
* Invite the donor to an event or to volunteer.