

Development Visit Planning Worksheet

Preparing for a meeting is essential to the success of the meeting.

**Before every meeting with a donor or prospect,
prepare the answers to each of these questions.**

1. Who will you be meeting with?
2. What do we know about their past philanthropy, what have they supported and why?
3. How do they make giving decisions? With their spouse/partner or on their own?
4. Why are they involved with our organization? What do they care about regarding our work?
5. Any personal or professional events or milestones to be aware of?
6. Which organizational representatives will attend?
7. What is the primary goal of the meeting?
8. What 3-5 key questions do you want to ask?
9. Roles of each organizational representative?
10. How are you going to end the meeting?
11. Do you anticipate what your next steps will be?
12. What materials do you need to bring to the meeting?

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