START HERE

Development Officer Toolkit

Use this kit to plan donor outreach, prepare for conversations, follow through on commitments, and report back to donors.

01 **Plan your outreach**
The Discovery Visit Email User Guide · Discovery Tracker

02 **Prepare for the conversation**
The Donor Conversation Guide · Donor Conversation Cheat Sheet

03 **Capture what you heard and follow through**
The PAPPA Framework · Supercharged Contact Report · Donor Meeting Follow-Up

04 **Stay in touch and report back**
20 Minute Impact Report Template · Why People Give · Donor Salon Events, Step by Step

Open the complete toolkit checklist

Find all 13 items, including the internal agenda, site-visit checklist, and original training videos.

Toolkit checklist

Open the linked edition for each item. Check off each item as you use it.

	TOOLKIT ITEM	USE THIS EDITION
☐	Start Here	Toolkit card New card
☐	Best Outreach Email and Cadence	Discovery Visit Email User Guide · PDF Library
☐	Donor Tracking Tool	Tracker and walkthrough · Make a copy Library
☐	Scheduling and Preparing for Donor Visits	Visit planning checklist · Watch the video Library + edited video
☐	Is My Donor Ready for a Gift Convo?	Readiness guide and video Library
☐	VIP/DONOR Site Visits Checklist	Online checklist · Print checklist Library + new print PDF
☐	Supercharged Contact Report	Contact report · PDF · PAPPA Library
☐	20 Minute Impact Report	Worksheet and prompt · PDF Library
☐	Salon Series Step by Step	Donor Salon Events, Step by Step · PDF Library
☐	Why People Give	Guide and videos · PDF Library
☐	Fundraise Without Fear or Feeling Awkward	6 Steps guide · PDF Library
☐	Gift Officer Fundamentals	Video watch list Videos + new index
☐	Internal Agenda Setting	Agenda guide and worksheet · Original PDF New guide

Donor conversation companions

Complete guide · Cheat sheet · Donor Meeting Follow-Up

EFC Fundraising Library

Internal Meetings With Your Leadership

Whether you're meeting with your supervisor or a member of your leadership team, these are the most helpful topics to cover.

Before the meeting

ALWAYS SEND AN AGENDA, even if it's only a few bullet points within an email. Send it two business days in advance.

If you need to bring a problem to them, DEFINITELY bring two options for solutions

Hot Topics for Internal Meetings

- [ ] Fundraising metrics update, front and center
- [ ] Donor cultivation strategies for feedback
- [ ] Enterprise updates- what's coming down the pike?
- [ ] High visibility projects you're working on
- [ ] "No surprises"--share any concerns
- [ ] Bragging points/highlights aka "Things You Won't Know Unless I Tell You"
- [ ] Where I need your help
- [ ] How can I support you?
- [ ] "Coaching Corner" - this reserves time for sharing mutual feedback without calling it "feedback time" which triggers people
- [ ] How do you like to be reminded?
- [ ] What will it look like if you need more information in order to move forward?
- [ ] Regular career pathing conversation--once a month/quarter
- [ ] Request for an internal leadership opportunity
- [ ] Status on pending action items

Your agenda

Date

Attendees

What we leave with

Topic	Lead	Reserve	What we need out of it

Watch for

Parking lot

Original Internal Agenda Setting PDF · Toolkit checklist

Your Donor Visit Planning Checklist

Invite donors to visit your organization-and don't stress!

Why We Made This. So everyone who touches a donor visit works from the same plan.

Start Here

Plan the visit from the first strategy session through the follow-up and team debrief after your guest leaves. Work through each list below.

How to Use It

1. Share this with your planning team before your first strategy session.
2. Work through each list together and tick items off as they are settled.
3. Keep it open on visit day and run the Double-Check list that morning.

Timeline

1. Strategy session
2. Profile, briefing, outreach to key parties in schedule
3. Draft itinerary
4. Preliminary approvals
5. Meeting with those involved-final adjustments
6. Confirmation of venue, catering, meetings
7. Final approval
8. Itinerary to guest

Strategy Session

Participants

- ☐ Development team/lead
- ☐ ED, Prez, CEO, etc
- ☐ Events team
- ☐ Admin support

Key Considerations

- ☐ What is the desired outcome of the visit?
- ☐ Is this an element of the existing strategy for the donor?
- ☐ Who is taking the lead on organizing the day?
- ☐ Who needs to be involved with creating the itinerary document? Who gives final approval?
- ☐ When/how does the itinerary go to the guest?
- ☐ Who needs to be informed of this visit?
- ☐ Who writes the talking points for various folks to cover?
- ☐ Who will be with the guest during the day?
- ☐ Who is the point of contact on the day, if any issues arise?

Planning the visit

Briefing and Profile

- ☐ Define team to work on it
- ☐ Decide who needs to see these materials
- ☐ Who will deliver the materials?
- ☐ Create a timeline/deadline
- ☐ Send to important parties

Develop Itinerary

Program/faculty/artist/etc

- ☐ Request their involvement
- ☐ Confirm they are prepped (who is guest, why are they here)
- ☐ Do we need to have a back-up in case of scheduling conflicts?

Pre-Visit Research

- ☐ Invite spouse, kids, friends?
- ☐ Is there something/someone specific they want to visit/tour?
- ☐ Hotel reservation assistance?
- ☐ If a meal is involved during visit, any food restrictions?

Visit Day Logistics

- ☐ Directions to buildings/map
- ☐ Transportation and parking
- ☐ Build extra time in between meetings because everyone will run late
- ☐ What mobility issues do they have (walker, wheelchair, limited stairs, etc)?
- ☐ Time for guests to check phone/email/bio-breaks?
- ☐ Did they receive the itinerary?

Itinerary notes

Visit day and follow-up

Other Things to Consider

Gift

- [ ] Who decides what it is?
- [ ] Who orders/supplies it?
- [ ] What's the budget?
- [ ] Who pays for it?

Weather

- [ ] Back-up plan for inclement weather (umbrellas on hand, indoor options)

Photography/videography/interview

Double-Check

- [ ] Did guest receive itinerary?
- [ ] Did important parties receive briefing on guest(s)?
- [ ] Room numbers
- [ ] Travel time
- [ ] Possible delays (Construction? Traffic? Stops requested by the guest?)
- [ ] Is there a point person for each stop during visit?
- [ ] Are there any spots we need background knowledge on? (History of a building, named spaces, etc)

Post-Visit

- [ ] What is the follow up after the event with the guest?
- [ ] Who coordinates/writes that?
- [ ] Debrief with the planning team

Visit follow-up notes

Further Reading

The Donor Event Debrief · PAPPA · Donor Conversation Guide

Online checklist · Toolkit checklist

Gift Officer Fundamentals

Seven lessons from the original toolkit. Open the Library edition where one is available.

01 Time Management for Development Officers
Watch the video

02 Personalization at Scale Intro
Watch the video

03 Donor Relationships How Close Is Too Close?
Library edition

04 Do Less With Each Donor
Watch the video

05 Discovery pain points
Watch the video

06 Naming Your Donors Correctly
Library edition

07 Right Person in Gift Conversations
Library edition

Donor visit training

Scheduling and Preparing for Donor Visits

Watch the video

Toolkit checklist