

Planning the Donor Visit

Name of Potential Donor: _____

Staff Cultivator: _____

Date: _____

Volunteer Cultivator(s): _____

Ask (Amount or Involvement): _____

Step	Who	Strategy
Greeting / Opening		
Explain the Purpose of the Visit		
Share Your Commitment		
How They Can Help (Include the Ask)		(Last time you shared that XXX was your giving priority. We are addressing that by XXX. Will you join me in making a gift of \$XX ?)
Discussion (Possible Objections)		
Close: Thank you and Confirmation		