

BOARD STEWARDSHIP

VISIT CHECKLIST

WHERE TO BEGIN

- Start by expressing gratitude for the donor's recent gift and/or ongoing support.
- Share recent successes, updates in numbers served, and any organizational changes.

SAMPLE QUESTIONS TO ASK YOUR DONORS

Giving Motivations and Connection to Organization

- Why did you give your first gift to our organization?
- What do you like the most about our organization?
- Is there a particular program, project, or area that interests you most?
- Do you have any questions or concerns about our organization's mission, goals, or operations?

How the Donor Would Like to Stay Engaged and Informed

- How would you like to receive updates on the impact of your donation? (Share channels that are currently available, for example, a newsletter, social media pages, etc.)
- Would you like to learn more about our organization through a facility tour?
- Are you interested in participating in volunteer opportunities?

Relationship Building + Learn More About Donor Motivators

- What other organizations are you passionate about supporting?
- Where did you learn about giving back?
- Do you remember the first philanthropic gift you ever made?

POST VISIT

- Follow up on questions asked or additional information requested during the visit.
- Add contact information to communication channels as appropriate (newsletter, social media, volunteer communication, etc).
- Note visit highlights and key takeaways in CRM database.