



Major Donor Progress Meeting – Sample Agenda

Goals:

- Focus on action – advancing individual strategies for donor engagement, solicitation, and stewardship
- Create mutual accountability among team members
- Celebrate successes, share tips and strategies, mutual support
- Refresh major donor pool – add new donors, “bless and release” others

Suggestions:

- Frequency: every 1-3 weeks. Intensity of activity may vary through the year depending on campaign goals/timeline, create enough time to make progress on assignments but not too much time to allow work to languish
- Schedule earlier in the day when team is more likely to be high energy/less distracted
- Length: 45-90 minutes depending on team, portfolio size, time of year
- Rotate host/facilitator responsibility among team members
- Send meeting reminder 48 hours ahead (a great catalyst for action)
- Snacks, snacks, snacks

Sample Agenda

Welcome

- Settle and re-connect on personal level
- Reminder of upcoming dates/events of note = opportunities for donor invites/engagement/stewardship

Mission Moment – Impact Story Share

- Sets the tone by sharing a camp, staff, alum or donor story of camp's impact
- Especially helpful for volunteers who aren't around camp daily
- Also provides a story that team members may use in meetings and calls with donors

Bell Ringers

- Time to celebrate successes



- May be a big gift commitment or securing a meeting with a donor who's been particularly hard to reach
- A cowbell, whistle or other party noise maker helps

Who's On Deck

- Review portfolio donors who are approaching their next ask
- Opportunity to review solicitation plan, confirm ask amount and purposes, rehearse and get feedback

Getting Un-Stuck

- Review assigned donors that team members can't seem to get traction with
- Revisit strategy and share "what worked for me" strategies among team members
- Consider trading assignment to give another team member a shot
- Time to "bless and release"?

Welcome New Donors

- Review new additions to the major donor pool
- Make assignments to team members for "discovery" and strategy development

Housekeeping

- Check in that systems are working to support team members' work and donor data is being accessed and tracked appropriately
- Reminders to support process: e.g., getting key info and data into the donor management system
- Consider possible new team members

Next Meeting Date/Time/Location and Host

Gratitude and Adjourn

- Close with good feels
- Opportunity for a second mission/impact moment – e.g., a thank you from a camper family, scholarship recipient, etc.
- Host express gratitude to the team