



Major Gifts

FOR YOUR CAMP



Major Donor Portfolio Action 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.

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.



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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 portfolio 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.
- 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.