



LEVEL-UP

Tips to remember so that you always treat a donor like a human and not a bank transaction.

Your path to leveling up:

1. Do your research

Research the donor background, experiences and interests before your meeting.

2. Approach as a partnership

Have an interactive conversation about the issues you and the donor care about in common

- **What not to do:** I read your guidelines on the Web and I have a list of projects you might be interested in...out of the list what can you fund?
- **What to do:** I am guessing you know a little bit about my organization – what interests you most about what we are doing? And overall what are you interested in?

3. Assume the best

Donors want to help and be part of the work – do not keep them at arms length.

Four best tips to assume the best:

- Invite donor to strategy meetings
- Create donor only info sessions with expert staff
- Bring them into your big decisions or big wins
- Include donor in your surveys or organizational reviews