



**Cultivating
Connections:**

**The Art of the
Donor Visit**

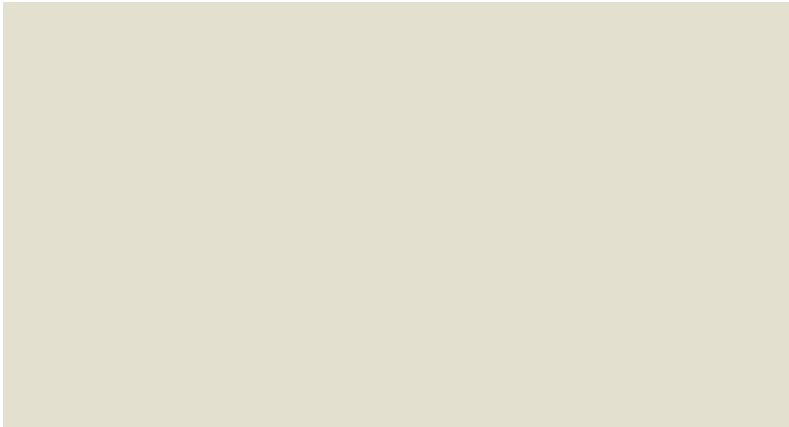
Relationships Over Transactions

Trust Drives Generosity

Partners, not Funding Sources

Uncovering the 'Why'





Why Face to Face Visits Matter

- "Why?"
- Build Trust & Belonging
- Personalize Stewardship





How to Get a Visit?

**Pick up your phone
and call!**



Before the Visit:

- Do your homework
- Understand Giving History
- Prepare Questions





LISTEN – LEARN – THANK



A Stewardship Story: Why Staying Connected Matters



The Power of Listening

- Listen rather than Lead
- Ask open questions
- Allow pauses - reflect back what you hear



Another Story: Phyllis



During the Visit

Lead with curiosity, not an agenda.

Listen more than you speak.

Remember, it's their story you are learning about.

Be patient. Relationships unfold over time.

Leave the visit with the donor feeling valued.

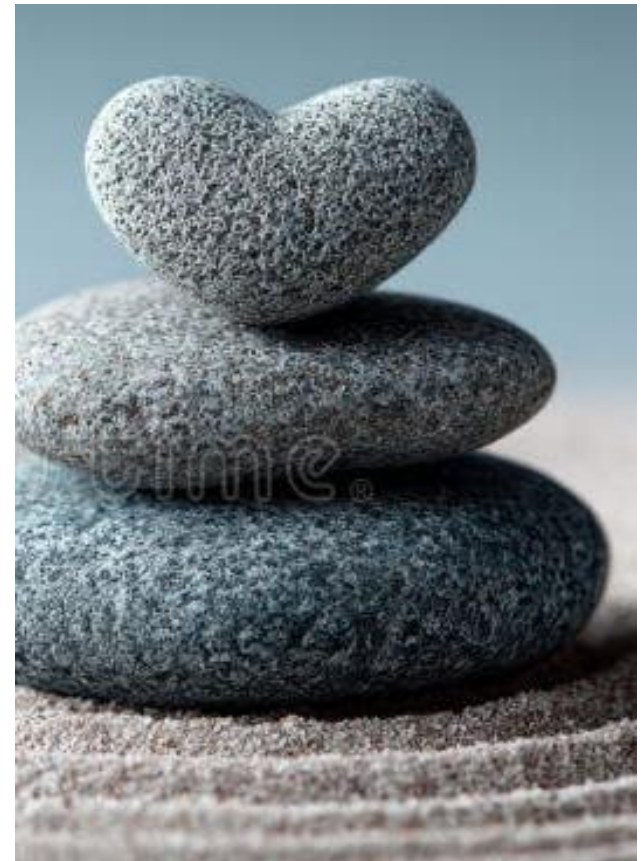


Stewarding in the Moment

- *Your support has made a difference!*
- *Because OF YOU...*
- *With your help...*
- *Your gift...*
- *Thanks to your support...*
- *You make _____possible...*
- *We couldn't do it without you...*

“I wish I could do more...”

- **The Cue:** *"I wish I could do more"* is an open invitation to deepen stewardship.
- **The Approach:** Stay connected first—don't rush the conversation on visit one.
- **The Content:** Share stories of bequest donors to inspire what's possible.
- **The Value:** Invite them to advisor-led sessions on estate strategies, capital gains, and lifetime vs. legacy tax savings.







Typical Characteristics of a Legacy Donor

- 60+
- Female
- Do not have children
- Single or widowed
- Appreciated property
- They purchase holiday items and collectibles
- They have a strong loyalty to your organization
- “I wish I could do more!”



Practical Stewardship

- **Document the highlights of your visit**
- **Follow up promptly**
- **Personalize stewardship**
- **Plan next meaningful touchpoint**

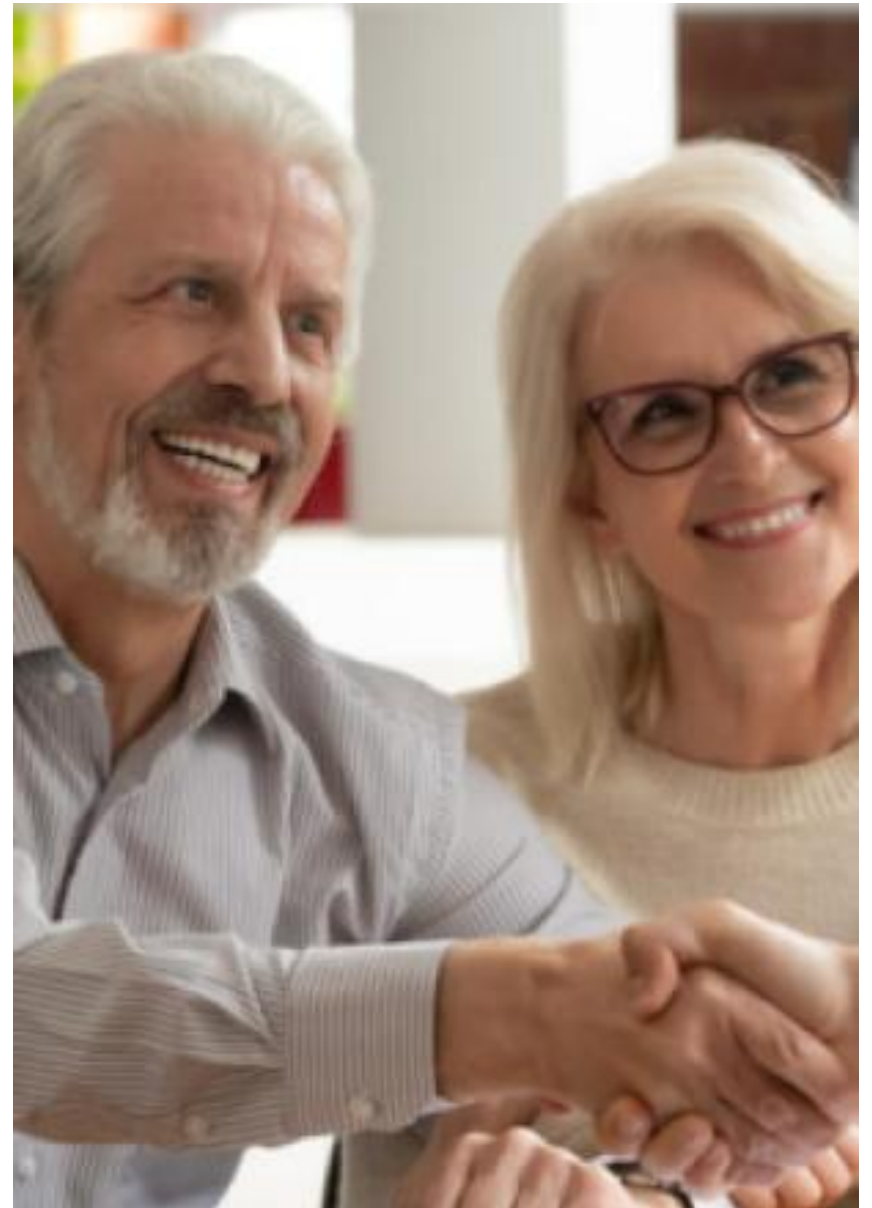
Practical Stewardship

- Send thank-you email immediately after the visit
- Handwritten note cards
- Emails sharing news
- Birthday / Anniversary cards
- News releases to update and re-engage donors
- Photos
- Celebratory messages about program milestones the donor cares about
- Handwritten notes attached to newsletters, annual reports, impact report and receipts
- Invitations to events, and information sessions

Safety Checklist

- Share your itinerary with your colleagues
- Park visibly and lock your car
- Bring your phone and wear your name tag
- Dress simply and professionally
- Prepare for pets
- Leave a business card
- Trust your instinct







Questions & Comments?

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