

Pre-visit Briefing Template

Instructions

Complete this guide before donor visits in which academic partners will participate. Review the information in-person before the visit to answer clarifying questions and provide additional details.

Donor Information

1. Donor Name(s) and Age(s): _____

2. Interests: _____

3. Most recent gifts to the institution:

Date	Amount	Purpose

Meeting Details

1. Date and Time: _____

2. Location: _____

3. Desired Outcomes:

4. General Meeting Agenda:

Pre-visit Briefing Template (cont.)

Roles and Responsibilities

	Development Officer(s)	Academic Partner(s)
Role		
Key Talking Points		

Difficult Questions

Prepare sample donor questions on the following topics so that academic partners understand how to respond during the meeting. Feel free to add other questions based on your knowledge of the donor.

1. Why should I invest in you?
2. What do you do differently from other colleges and universities? How will my impact be greater here?
3. How will you respond to this red flag or roadblock?
4. How will this project align with my worldview and political perspective?
5. Can you respond to recent negative press about the institution?