Effectively Meeting with Funders Checklist

The following are some helpful reminders to assist you in having an effective meeting once you have received approval from divisional headquarters.

1. Co-ordinate your meeting plans with applicable divisional/territorial staff.

* Identify the audience with whom you are meeting.

1. Together, determine who needs to be present for the meeting (e.g. a program participant or Salvation Army leader).
2. Define the meeting’s goal.

* Open the meeting with a general introduction, the purpose of why you have called the meeting, and what you hope to get out of the meeting.

1. Personalize your message to your audience.

* Tell them why they should care and take action on your behalf.

1. Assign roles for those participating in the meeting.

* Greeter, Introduction.
* Date, Information, Anecdote or Argument.
* Closer.

1. Collect and package materials you will bring.

* Salvation Army-branded folder and business cards.
* Fact sheets.
* The Salvation Army’s Annual Report.
* Other research or information on the subject.

1. Rehearse your roles with your group and be prepared for a short meeting.

* Who will ask for support, if applicable?
* Who will be the contact person?
* What further data do they need?
* When do you expect to hear back from them, or when will they hear from you?
* What are the next steps?

1. Follow up with your representative after the meeting.

* Send a thank-you letter to the official or their staff.
* Follow up with a phone call to schedule additional meetings or a site visit, if appropriate.