

One of the truisms of fundraising, corroborated by expert fundraisers across nearly every type of nonprofit is that meeting in-person with donors almost always provides the best way to upgrade a donor to a more significant level of giving.

Which begs the question, where do you meet with them?

Rather than rushing ahead to the answer, start by reminding yourself: why are you meeting with them?

In general, you're meeting with them to:

- Get to know them better
- Have them get to know you better
- Have them better understand how the organization's work matches up with their values
- Ask for their support.

Given those goals, the major area of concern would be if the location is not sufficiently private for people to feel comfortable discussing their values or their money. Likewise, the venue shouldn't be so noisy that it interferes with the flow of the conversation.

So in order of priority, I'd suggest asking them if they'd like to meet at their home or place of business.

You can say something like: "I'd be happy to meet you at your home or work if that's convenient to you, or we can figure out some other option."

If they leave you the choice, opt for the home.

If they say they are interested in another option, my next recommendation would be if you have some location that demonstrates the value of your work. This could be a mini-tour. But only if there's a quiet place to talk and sit down while doing so.

If nothing like that fits the bill, I'd then suggest your office. But that's only if your office meets standards of professionalism that will match up with a donors' expectations.

Lastly, if that's not feasible, suggest a coffee shop or restaurant. A public location is least likely to be conducive to the conversation and most likely to offer up distractions. With that said, it's sometimes the right choice. While you want to go somewhere good, prioritize places you know are usually not busy. The last thing you want is for you and the donor to show up at a coffee shop where there's no place to sit.