

Major Gifts

Instructions For The Volunteer Solicitors:

CONTACT the prospect by telephone, in person, or with the solicitation letter provided to you to set a time to meet. (Whatever is best, considering your level of association.) Initially, or following your letter, introduce yourself and request an appointment. Convey enthusiasm when speaking about your own involvement with the Major Gifts campaign, but avoid going into too much detail about the funds needed at this time. If the prospect asks, "Is this about money,?" you can respond lightly that you will not be expecting him or her to bring along their checkbook at that time. Rather, you would enjoy and appreciate the chance to meet to talk about the organization and the campaign, and that you would consider it a distinct favor to have that opportunity. Offer several dates when you are available to meet, and emphasize that the meeting will take no more than one hour or so of their time.

REVIEW with care just prior to your meeting all of the materials and information relevant to the organization and the campaign, as well as everything you know about the prospect.

TALK ABOUT their professional and personal interests, mutual friends, etc., first, to connect and to establish rapport. Work the fundraising program in slowly, citing your own personal involvement and commitment, and the value of the organization to the community.

ASK your prospect to consider their support by making a pledge in the suggested amount provided to you. The prospect should know exactly what it is we would like as their gift to help us meet our goal. Remember, we are suggesting, and not telling them, what to give. As appropriate, tell them about any applicable "membership" gift opportunities available for the gift. (With individual prospects, find out if they have a gift-matching program with their employer.)

INFORM them that we welcome pledges, and that the payments are tax deductible according to what the IRS will allow.

RESPONSES made as "Yes" should be reported immediately to allow the contributions to be properly and promptly acknowledged. "Maybe" could be an opening to encourage a gift by citing an even more liberal pledge payment schedule. Even so, you will need to agree upon a reasonable follow-up date to secure a final response. If the answer is "No," try to determine why, but in all instances, give sincere thanks for their thoughtful interest and concern.

In summary, to be effective, you must:

- Not procrastinate in making contacts and appointments
- Talk personally and directly to the prospect when seeking the appointment
- Visit the prospect
- Be fully informed and prepared to make the case and to answer all questions
- Follow-up with the prospect after each step
- Never leave it up to the prospect to take the initiative
- Complete each solicitation with verbal or written reports