

## GETTING A GIFT AND A CAMPAIGN LEADER

*"Obtaining gifts and leaders for a Scottish Rite Fraternal or Philanthropy Endowment"*

### Preparing To Make The Visit

It is most important to realize that this process is designed to get more than a gift. Whereas annual fundraising is primarily about raising money, capital campaigns succeed ONLY if additional leaders can be continually recruited to help expand the reach of our organization into new prospect sources. Even if you can call and get a gift, that is only a small part of the effort.

Before engaging in this process, it pays to do a little homework.

- FAMILIARIZE YOURSELF WITH THE GOALS OF THE CAMPAIGN. It is important that our "case" be presented consistently to all of our potential donors and leaders. It is certainly acceptable to add to the purpose, but we want to remain consistent in our message
- NEVER ASK FOR A GIFT OVER THE PHONE. Even if successful, it diminishes the importance of the campaign and pretty much precludes the possibility of cultivating the potential leader and getting them to help open doors to other leaders. Only by continually recruiting new leaders will the campaign reach new levels and new prospects.
- CALL PERSONALLY – DO NOT DELEGATE THE REQUEST FOR AN APPOINTMENT. This campaign must be a priority. Personal connections are very important.
- BE ENTHUSIASTIC - WE ARE DOING GOOD WORK ... NOT BEGGING. You have a chance to do something special – secure the financial future of our great fraternity and help serve children with special needs. To do this, you need to share the story with people you know. In its finest form, this is all that fundraising really is.

### Getting the Appointment

- Call to set the appointment. When making the call, the only purpose of the call should be the capital campaign and your desire to meet in person. Don't combine it with other items. Combining the purpose of the call cheapens the campaign and fails to convey the urgency required.
- Do everything possible to avoid a detailed discussion over the phone. The more you say over the phone, the less reason there is to meet! Remember, the phone call is to get an *appointment*, not a *gift*. Since we want more than a gift – we want them to lend their name and open doors as well – asking for a gift over the phone should be discouraged. Arrange ample time for your visit (usually 30 minutes or so).

- Always work with another Brother. It's just easier to have someone who can help with the process.
- Ideally, when asking for a gift from an individual, set the appointment in the prospect's home, with the spouse present. If you are looking for a corporate or business gift, the appointment should be with the owner or high-level executive. Talk directly to the decision-maker to avoid the dreaded "submit a proposal" process. Additionally, remember we want help, not just money, from our leaders – as such, the higher in a corporate structure you can go, the better the leader.
- Avoid restaurant meetings, unless the meal is at the office and includes a tour. "Lunch" meetings usually bog down and lessen the importance of the work you are doing. Take them to lunch **after** you meet!
- If the prospect is reluctant to meet, be firm but sympathetic. You might say something like:

*"I understand how busy you are, but this is very important to me. I guarantee you that after 30 minutes, you will learn some very interesting things about our community. I feel so strongly about it myself, that I am personally visiting with key Scottish Rite leaders myself. If I promise it will not take more than 30 minutes, would you agree to an appointment?"*

### **The Visit**

Every meeting will be a little different, and volunteers are encouraged to personalize the presentation to fit their own styles. There is no one perfect way to conduct a meeting. Keep the overall objectives in mind and make each meeting meaningful and you'll find that most people will respond positively.

MAKE PERSONAL VISITS ONLY. WORK WITH A PARTNER.  
 USE BROCHURES OR OTHER AIDS  
 ASK FOR A SPECIFIC GIFT OR GIFT PLAN.  
 ESTABLISH FOLLOW-UP PLAN AND/OR TIMETABLE.

### **THE MEETING**

- Open the meeting with small talk and then give a brief personal overview of the capital campaign.
- Use a brochure. It should be specifically designed to cover all the details. Walk through the entire brochure. Take the time to talk about the project and the benefits it will bring to the community. Do not rush through this portion and then quickly ask for the gift. Let the prospect come to understand and accept the project, and its importance to the community.
- Tell the prospect about the fund raising success to date. Keep updated as progress is achieved.

## **Asking for the Gift**

- Once you have fully explained the objectives of the program, your next step will be to request a specific gift and participation in the campaign. It should be clear which of the visitors will actually ask for campaign participation from the prospect. What counts is to make the request in a clear manner.
- Ask for the gift and leadership as follows,

*"(Name), we would like to ask you to help us in three ways.*

*First, we would like you to lend your name to the campaign. Brethren respect your judgment. By including your name in our leadership group, our campaign will gain credibility.*

*Secondly, we would like to ask you to help open five doors to members at your peer level. We know that people will respond to our message **IF** we can get to see them face to face. That's where we need your help.*

*And finally, we know we have no way of knowing what you might be capable of giving, but we would like to ask you to consider a leadership gift of \$x,xxx per year (or monthly amount) for each of the next five years, a total gift of \$xx,xxx.*

*Does this sound like something you can do to help us?*

- NEVER, EVER apologize for asking for a gift or leadership. You are doing good work and are simply asking someone else to support something that you believe in and have supported in a similar manner.
- After you ask for the specific gift, let the prospect respond to your request, then you can respond to the prospect's answer.

## **RESPONDING TO THE RESPONSE**

- The response will be one of four answers.
  - a) If yes ... thank the donor and ask him to complete a pledge/gift form.
  - b) If no ... politely thank the prospect and leave as quickly as possible.
  - c) If he requests time to consider the request ... this a positive answer and means the prospect is seriously considering your request. Graciously grant the time, but **set a return appointment before leaving**. It is best to set the return appointment for within one week of the initial visit.

d) If he offers a lower amount ... if you believe this may be the most the donor will ever give, accept the gift and complete the gift intention form. Many donors will actually give more if given a little time, and rarely will they lower the gift if given time. You may consider offering the donor some time to think about it. A good response is ...

*"I really wasn't prepared for you to make a decision right away. I'd like you to think about your involvement and I'll come back to see you."*

**(Then set a firm appointment!)**

**Some Final Tips . . .**

- Arrange for an appointment in a personal setting.
- Never mail the brochure or materials. Always make a personal visit.
- Always make a solicitation with another person.
- When you begin the visit, be a good listener and relax!
- Do not mention money until everything else has been said.
- Arrange for a second appointment during the first meeting, if necessary.
- Control is essential for good fund raising -- you must keep control of the relationship with the prospect. The final answer regarding the prospect's participation must be made to you in a personal manner and not over the phone or by mail.