

Solicitor's Guide

Habitat for Humanity of Greater Bridgeport



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SOLICITOR'S GUIDE (Asking for Gifts)

INTRODUCTION

This guide has been prepared to assist you in asking for gifts on behalf of Habitat for Humanity of Greater Bridgeport (Habitat). The methods suggested in this section are based upon the most effective fundraising techniques available to us.

Some examples of these techniques include:

- The use of personal solicitation. People give to people--because they believe in them, trust them and identify with them.
- The suggestion of a challenging gift amount. Most people committed to the mission and activities of an institution would help the organization significantly if they were in a position to do so. On different levels most people can play a decisive role (even if only collectively) in the life of an organization by providing as generous a level of financial support as their circumstances will allow.
- An effective solicitor will successfully illustrate the opportunity present for the community and the meaningful role the prospect can perform. People feel good when they are able to help someone or something they believe in, particularly when they are able to do so on a more profound level than they had thought themselves capable.

The suggested procedures in this section deal primarily with the steps in making an effective request. We do not discuss protocol, tact, etc. We assume that each volunteer will conduct him/herself with the utmost propriety. The success of our campaign depends on the integrity of our presentation and our sincere invitation to others to participate in this important and exciting project.

We are convinced that when people hear the story of Habitat's impact and begin to understand the great need and opportunity presented by the campaign, they will respond in a very generous manner. "Sharing the story" and addressing each prospect's questions, interests and values will establish a foundation for generous giving.

In deciding who will call upon whom, it is important to match potential donors with friends, peers and associates, etc. However, it is just as important that the visit be conducted in a formal manner. To simply bring up the campaign over lunch is *not* enough!

The potential donor must know why the campaign is something extraordinary. Do not "drop by" to talk it over. **Arrange a formal appointment!** It is always best for two solicitors to make each call. This gives one the opportunity to listen and think, while the other carries the discussion. Working together, each solicitor assumes some responsibility and strengthens the case for support.

Before you go on a call, prepare yourself. Be sure that you are motivated and ready. Know the story of Habitat and what we are trying to accomplish through the campaign. Consider the prospect's interests and past involvement. Be prepared to sell the project. Before the call, come to an agreement with your co-solicitor(s) on what level of gift to request and who will ask for the

gift. Then be absolutely certain that you ask, very specifically, for that amount. It is vital that you tell the person what is needed and how they can help.

Make your own gift first! This is the toughest decision you will have to make. Remember, however, that your fundraising credibility will be greatly enhanced after you make your own gift commitment. Then, move on to other prospects, always asking those who are more likely to say “yes” first. Continue to build on your growing body of committed supporters. With each new pledge, your network of supporters will become stronger and more influential.

WHERE TO START

1. Know your facts about Habitat and this campaign. Read through campaign information describing the needs of the facility and community and how funds will be spent to address these opportunities.
2. Talk with **CDS** fundraising counselor, David Phillips, about the level of support being sought. We must ensure that each person is asked to commit to a challenging, yet realistic pledge.
3. Before making the phone call to request an appointment, have a formal meeting with your co-solicitor and fundraising counsel to determine who will say what and when during the visit with the potential donor. Questions as to who is going to ask for the gift and the specific amount of the request should all be clearly defined prior to the call.
4. Agree upon specific dates and times when you and your co-solicitor and/or fundraising counselor can meet with a prospective donor.

SETTING UP THE APPOINTMENT

Now you are taking action — action you hope will result in a large gift to Habitat. To be as successful as possible, you should:

1. Call and ask for a formal appointment.
2. Imply from the outset that this is personally important to you.
3. Ask for a specific date and time from the prospect. Be sure to consider and include the prospect’s spouse in the request to meet (unless impractical, inappropriate or unnecessary).
4. Work hard to ensure that the prospect does not make a decision over the telephone, by saying: *“Your participation is too important to discuss over the phone. There are exciting things happening at Habitat that we want to share with you in person. Can we meet on Monday at 4:00 p.m.?”*
5. Do not discuss the campaign with a prospect over the phone. Make the appointment and give the prospect an appropriate presentation.
6. Be determined to get a personal meeting. If they know it’s important to you, then they will see you.

THE VISIT

When making a visit you want to remember to do the following:

1. Put everyone at ease.
2. Ensure the prospect knows enough about Habitat, the pressing needs of the community and the unique opportunity the capital project presents, to be able to make a decision to support the campaign.
3. Explain the objectives and vision of our program and why it is so important.
4. Ask for the specific gift you have in mind.
5. Handle the prospect's responses appropriately.
6. Follow-up properly.

Let's take a closer look at each of these six objectives and several things we might say to accomplish each of them.

GETTING STARTED—BE AT EASE!

Once you have arrived at the meeting place, you want to put the prospective donor at ease. You may want to begin by discussing friends or family you have in common, the prospect's relationship with Habitat or anything else that gives you a pleasant frame of reference. Whatever you do—relax, and be yourself!

DOES THIS PERSON KNOW ABOUT HABITAT AND YOUR GOALS?

Consider how much the other person knows about Habitat, why funding is needed and the opportunity the campaign presents. If the person knows little about Habitat, tell them about the history, the mission, and the impact it has on the community. Tell them things that impress *you*.

Now that you have illustrated the opportunity and shown what we are trying to accomplish, you must ask the prospect to help us.

ASK FOR THE GIFT—BE VERY SPECIFIC!

You need to ask for the agreed upon amount. If your partner does not articulate the amount, you must do so. This is crucial. The potential donor has no idea what you want, need or might suggest. Your job is to suggest an amount in a tasteful and unapologetic way. You might say:

- “We want to give you an opportunity to participate in the life of Habitat and the community we serve at the highest possible level. With this in mind, we would like to ask that you and your family consider a gift of \$20,000 this year and \$20,000 in each of the next four years. (Pause... before saying) How does that sound to you Mr. Smith?” or,
- “Jan and Tom, you have been wonderful leaders in our community for many years. It is only natural that, as we begin looking for solid leadership for our campaign, we come to you. We need your help. We do not know what your personal situation is or to what extent you can help. We do know we have an enormous opportunity to strengthen our community through Habitat and we know you understand the urgency and challenges

involved. For these reasons, we would like you to consider a gift of \$30,000 each year for the next five years. (Pause...) Is that something you might find possible?"

HANDLING THE RESPONSE—ESSENTIAL, YET EASY!

Please do not go to extreme lengths to anticipate every possible response. We have found there are generally four categorical prospect responses:

1. **YES.** (Roughly 10% say "YES" outright.)
Well, that is easy enough to handle. Thank them and explain that they will get a confirmation letter from the campaign office. Answer any questions they may have, give them their proposal and leave.

2. **NO.** (Less than 5% say "NO" -- the most unlikely response.)
Talk to them about why they are declining. Is there an obstacle that can be surpassed? Thank them and give them the proposal. Then ask them to take a look at the material at their convenience and call you if you can be of any assistance. Do not leave the pledge card (or the letter of intent).

3. **I NEED SOME TIME TO CONSIDER THIS.** (More than 70% respond this way—the most likely response.)
Thank them and assure them that you understand the need to consider this carefully. Explain that you brought a written proposal for just this purpose. Do not—under any circumstances—leave the pledge card (or letter of intent) with the prospect! The caller always retains control of the pledge card. Arrange to meet them again a week later to discuss it further and to get their response.

4. **I DO NOT KNOW IF I CAN GIVE \$25,000, BUT I CAN GIVE \$10,000.** (Some 15% respond in this way. Must be handled tactfully!)
If you are relatively sure they have considered the program carefully, and that they cannot afford to give the requested amount, you would be well advised to accept the gift. (Then, you would respond exactly as you did to "yes" in the first example above.)

If, however, you think they may simply be making you an offer to see whether your request is real and pressing, you should graciously defer the gift pending their further careful consideration.

You might wish to say, "I really appreciate your consideration and I am ecstatic that you wish to participate in this worthy project. Habitat means so much to me. If you explore this proposal carefully, I believe you will see why. Let me just spend some time explaining why it is so crucial we gain your participation at a certain level ... John, since this is such a big decision, I would like to leave this with you for several days. Could we meet again at this time next Friday to discuss your participation?"

APPROPRIATE FOLLOW-UP

You have made a fine presentation. It is apparent to the potential donor that this campaign is funding essential work and that it is vitally important he/she participate, if we are going to be successful.

If you fail to follow-up quickly and effectively, you will dispel all of the notions above. All that you do to make the call properly is aimed at creating an image that this campaign is absolutely vital to us by:

- 1. Asking for a formal personal meeting,**
- 2. Having two people take time out to go present the message,**
- 3. Asking for a substantial commitment, and**
- 4. Presenting a written request.**

It is imperative that you meet with the prospect, in person, one week to ten days following the request to discuss the proposal and obtain their response.

This brief document was created to help you become more comfortable with the idea of asking for Major Gifts on behalf of Habitat. This will free you to make more requests and you *will* raise more money.

Even the greatest procedure on earth is without value, unless people are comfortable enough to use it. The biggest obstacles we are trying to overcome are inertia and peoples' natural fear of failure and rejection. If there are any questions, or if you feel you need any further clarification, please contact David Phillips at CDS at (843) 971-8801, or on his cell at (843) 693-8145.

Good luck!

Custom Development Solutions, Inc., offers consultation services to non-profits of all sizes across the USA and Canada in fields that include strategic planning, feasibility & planning studies, and, of course, capital campaign management.

CDS builds an individualized strategic plan for each client, as every non-profit organization is unique and deserves such a customized approach to their project or campaign.

Why set up a consultation with CDS?

**Click here
to schedule
a free 30-minute
consultation**

- ◆ Establish whether you are ready for a capital campaign, or what steps will get you ready
- ◆ Brainstorm strategy ideas with one of the industry's leading experts
- ◆ Determine if CDS may be the help you need to make your campaign a successful one
- ◆ Take your first steps to raising the money necessary to meet the needs of those you serve in your

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