



The following document is a sample from a real campaign directed by Capital Quest. Permission is hereby granted for printing this document for the limited purpose of education and training of board members and community/campaign leaders. It is copyrighted material.

For more information on Capital Quest please see contact information below:



**Capital Quest, Inc.
Consultants Serving Philanthropy Nationally
Since 1992**

800-263-1976

www.capitalquest.com

Bill.Krueger@capitalquest.com

EFFECTIVELY RECRUITING CAMPAIGN COMMITTEES

The easiest way to get potential campaign leaders (community leaders) involved in the campaign is to get them to hear the campaign story. The low-key, simplest way to do that is to get each of the potential campaign leaders to attend a special dinner event (similar to the one the campaign did with the board members).

The dinner event recruitment tactic is the best way to “invite” leading people and families throughout the area to be a part of the campaign, without appearing to pressure them or even make it look like the campaign is even “soliciting” them. There are, however, several keys to this approach.

1. Invitation

Board members have to accept that they are the primary inviters for this type of event. Essentially, board members should be the most enthusiastic volunteers available. Additionally, with CRMC’s board, the individual board members represent key community contacts. They are well respected and can, generally, reach everyone we’d like to reach.

That said, it is important that the board members approach this process seriously and put in the time necessary to make it a success. Campaigns that struggle invariably struggle at this point: recruiting community leaders.

The invitation to the dinner must be personal. No letters, no voice mails, no emails. A phone call talking to the person the campaign is inviting is the only acceptable way to invite someone to this event. Experience clearly shows attendance is as much as three times higher when a personal phone call invitation is combined with a *confirmation* letter.

2. Selection

The *Prospect Identification and Research Committee* has already identified the primary candidates to each of the two committees the campaign is focused on at this time – the Major Gifts Committee (>\$50,000) and the Leadership Committee (>\$10,000). Ultimately, well over 80% of the funds raised will come from the work of these two committees.

That said, if you think of someone not identified for either of these committees, please feel free to invite them – after clearing them with <Foundation Director> to make sure no one else has invited them.

And, as always, spouses are not only invited, but encouraged to attend the dinner event as well.

3. Invitation Process

The invitation process is pretty simple. Each candidate is assigned to someone already supporting the campaign (board members in this case). The campaign leader calls the

candidate and asks them, and their spouse, if appropriate, to attend the dinner at the date, time and location set.

If the person receiving the invitation says “yes”, then all the volunteer has to do is remember to call and remind the invitee a day or two before the dinner.

If the person being called can NOT make it that day for that event, the caller needs to, during that initial phone call, make an appointment with that leadership candidate to have a personal one-on-one meeting BEFORE the scheduled dinner. It’s important that this personal meeting is scheduled during the initial phone call and takes place BEFORE the dinner. If a personal meeting is set, the person arranging the appointment should call <Foundation Director> immediately.

4. The Event

The actual dinner event is very close to the same event that was hosted for the Boards of Directors. It is certainly the same approach. Speakers will outline the reasons for the project and the campaign, the video will be shown, the audience will share in the success to date, and the role that the campaign wants each attendee to play will be fully and completely explained. Questions will be answered.

Each attendee will be provided a packet of information including a “request” letter, the campaign brochure and a pledge card with return envelope. As with the board, employees, physicians and others, they will be encouraged to make and record a decision. There will be no pressure to make a gift ... just encouragement to make a decision.

Finally, each attendee will be asked to complete a simple “courtesy card”. This card will allow the attendee to indicate what, if any role, he or she will have in the campaign. **The options will include:** allowing the campaign the use of the attendees name, agreeing to help open some doors to potential funders, and be financially supportive (without indicating the level of support).

5. Committee Meetings

The campaign acknowledges that your time is incredibly valuable and what ever time you can spend helping this effort needs to be incredibly productive. As such, over a period of about 90 days, the campaign anticipates four (4) meetings.

1. Today’s Meeting. (December 10, 2007)
2. Report Meeting. About one week before the Dinner Event the committee will meet again to report on how the invitation phone calls have gone. Individual strategies will be created for challenging community leaders, and the reminder call will process will be implemented. (_____)
3. Dinner Event. As described above. (_____)

4. Final Meeting. A special meeting to wrap up this leadership recruitment phase will be held about a week after the Dinner Event. (_____)