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Since 1992**

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# **RECRUITING/SOLICITING COMMUNITY LEADERS**

## *Preparing To Make The Visit*

FAMILARIZE YOURSELF WITH THE BROCHURE  
NEVER ASK FOR A GIFT OVER THE PHONE.  
CALL PERSONALLY – DO NOT DELEGATE THE REQUEST FOR AN APPOINTMENT  
BE ENTHUSIASTIC - YOU ARE DOING GOOD WORK ... NOT BEGGING.

## **GETTING THE FACE-TO-FACE MEETING**

- 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 not get into a discussion about the campaign over the phone. Remember, the phone call is to get an *appointment*, not a *gift*. NEVER ask for a gift over the phone. Arrange ample time for your visit (usually about 30 minutes)
- Always work with your partner – never alone – and make sure s/he is available when you set the appointment.
- 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.

## **The Visit**

MAKE PERSONAL VISITS ONLY. ONLY WORK IN PAIRS.  
USE THE BROCHURE, PAGE BY PAGE.  
ASK FOR A SPECIFIC GIFT USING THE SOLICITATION LETTER.  
ESTABLISH FOLLOW-UP PLAN AND/OR TIMETABLE.

## **THE MEETING**

- Open the meeting with small talk and then give a brief personal overview of the case.
- Use the brochure. They should hear the case twice: once when you go through the brochure and then once when they see the video. Do not rush through this portion and then quickly ask for the gift. Let the prospective leader come to understand and accept the campaign, and its importance to the community.
- Anticipate questions and be prepared to answer the toughest ones. When answering questions, it is often best to answer briefly, without a lot of explanation (explaining looks like selling).
- Tell the prospect about the fund raising success to date. Keep updated as progress is achieved.

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## ASKING FOR THE GIFT

- Once you have fully explained the objectives of the campaign, your next step will be to request a specific gift.
- Using the letter that will come with the prospectus, ask for the gift as follows:

*<name of prospect>, we're hear today to ask you to consider helping building this facility by doing three things:*

*First, we'd like to ask you to lend your name to the campaign and allow us to share with others that you support this effort.*

*Second, we'd like to ask you to help us open doors. This doesn't mean we're going to give you a list of people to call. Instead, we'd like your help helping us arrange a personal meeting, like this one, with selected people throughout the area – people you'll help us pick.*

*Finally, this is a fundraising campaign. We'd like to ask you (or name of company/foundation), to consider a gift of \$\_\_\_\_\_ per year for five years, a total gift of \$\_\_\_\_\_.*

*Do these things sound like things you can do to help us build Niagara Hospice House?*

- NEVER, EVER apologize for asking for a gift or leadership.
- After you ask for the specific gift, then “shut up.” 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/her to complete a gift intention form.
- b) If no ... politely thank the prospect and leave as quickly as possible.
- c) If he/she 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/she 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 Tips . . .

- Arrange for an appointment in a personal setting.
- Never mail the prospectus or materials. Always make a personal visit.
- Always make a solicitation with another person.
- Do not mention money until everything else has been said.
- Arrange for a second appointment during the first meeting, if necessary.