

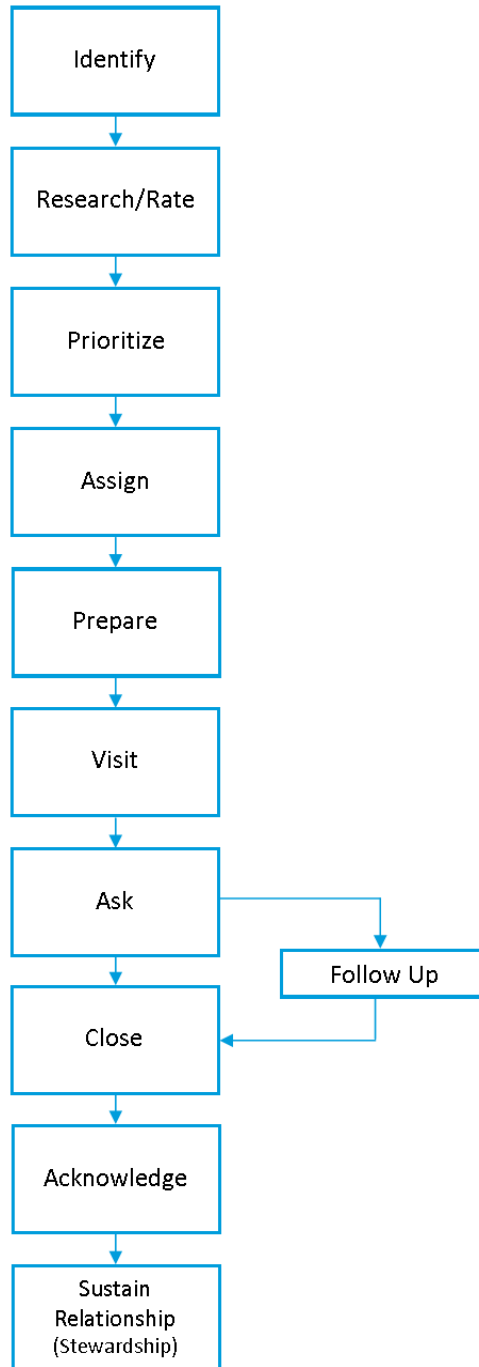


Major Gift Solicitation Manual

Catholic Alumni Partnership



THE SOLICITATION PROCESS



IN ADVANCE OF THE VISIT

1. Make your own gift first.
2. Convince yourself that this is something that you should be doing and will handle well.
3. Establish an attitude that will not be apologetic when you visit your prospect. Consider the fact that when you make an approach for a large gift you are doing so for the school, and future of Catholic elementary education, and not yourself.
4. Fully consider what the fundraising effort will mean to the present and future of your school.
5. Most importantly, **be enthusiastic!**

PREPARING FOR THE VISIT

1. KNOW YOUR PROSPECT

Working with the major gifts officer, gather all possible information on your prospect.

2. KNOW WHAT TO ASK FOR

Discuss with the major gift officer the ask amount and naming opportunity you will present to your prospect. **Keep your sights high.**

3. KNOW THE CASE

Your job is to articulate a “need” and to present the fundraising initiative as a vehicle to address that need. As a volunteer, you must be very familiar with the case statement. Please review it very carefully.

4. SCHEDULE A FACE-TO-FACE MEETING

Arrange for a personal meeting at the prospect’s convenience. A personal visit will emphasize the importance of the effort, provide the best forum for presenting the statement of need, and maximize the level of giving from potential donors. Encourage your prospect to meet with you at an appropriate location – more often than not, it would be at the school, the prospect’s home or the prospect’s place of business. A lunch or dinner appointment is also an effective and collegial atmosphere for a personal solicitation.

5. REVIEW YOUR STRATEGY WITH THE OTHER MEMBER(S) OF THE SOLICITATION TEAM

Plan in advance who will make the case and who will make the request. Try to anticipate possible points of resistance and develop sound responses to those points.

WHEN MAKING THE VISIT: The Request

1. BEGIN BY BEING RELAXED...AND LISTENING

Engage in casual small talk until you are both comfortable and at ease. Be a good listener. It is likely that the more information a prospect provides up front, the better positioned you will be to develop the proper solicitation approach.

Be prepared to spend a good deal of time with the prospect if the situation seems appropriate. Most solicitation calls take thirty minutes to an hour or more – do not rush. Avoid any mention of money until you have had the opportunity to “make your case.”

2. MAKE YOUR CASE

It is more important that your approach be personal and positive at all times – not, “I don’t know how interested you are in this...” Rather, it should be, “I feel very strongly about this, and I know you will be as interested as I am...” In most instances, your approach to the prospect will be based on his or her relationship to the school. When presenting the case for support, your objective should be to make your prospect as enthusiastic about the school and the Catholic Alumni Partnership as you are.

Your articulation of the case for support should focus on the school and its future. Additional emphasis can then be made on the entire well-being of Catholic elementary education.

3. MAKE “THE ASK”...AND ENCOURAGE THE PROSPECT TO REACH

When you feel you have fully developed the case, begin your solicitation of the prospect by asking for consideration of a particular gift. Explain to your prospect that you would like him/her to consider a major gift to (School Name). For example:

“I would like to ask you to consider a gift of \$5,000 to (School Name).”

4. Immediately following the ask, say nothing (count to ten) and let the potential donor respond first. It may seem like an awkward silence, but the donor is just breaking down the request you have made of him or her.

While it may be beneficial to mention the tax benefits that would accrue to the donor by a gift to the school, there is no need to overemphasize this point. Major gift prospects are usually fully aware of the tax benefits. It is the case for support that will sell – not an approach based on tax relief.

WHEN MAKING THE VISIT: *The Response*

1. LISTEN TO THE PROSPECT'S REPLY

When you have asked for a substantial gift, a positive response is when your prospect tells you there is interest, but that he or she will need to consider the matter further. If this is the case, don't push. Readily grant the prospect the time to consider his or her level of support and arrange a time and venue (within a week to ten days if the prospect's schedule permits) to follow-up.

2. RESPOND APPROPRIATELY

If your prospect chooses to make an immediate decision concerning a gift, one of three situations will develop:

- A. ***You receive the requested amount*** – Do not prolong your visit or continue selling: prospective donors can experience a change of mind when over-sold. You may give them a copy of the pledge form (which they can complete then and there, or return to the school by mail). Be certain to express sincere thanks and inform them that they will receive an acknowledgment letter from (TBD) confirming their gift.
- B. ***An offer of a gift below your expectation is made*** –
 - (1) If the prospect's offer is not too far below what you hoped for, it may be advisable to accept the offer.
 - (2) If the prospect's offer is *considerably* lower than the expected amount, then suggest that the prospect give further thought to the matter and possibly discuss this gift with other members of the family, a lawyer, an accountant, etc. Point out that, at this early stage of the launch of the Catholic Alumni Partnership, we are seeking major gifts to set the pace for the entire program to follow.

Tell the prospect that you will follow-up in a week or so and review the situation at that time. This is the most important item, because in many cases your second contact with a prospect will produce the desired amount, or, if not, at least a gift amounting to more than the prospect's original offer.

- C. ***The prospect indicates a complete refusal*** – In this situation, **leave the door open** for another contact. Be sincere in thanking the prospect for his or her time. Ask him or her to extend you the courtesy of giving further consideration to the Catholic Alumni Partnership effort at (School name) and say that you would like to call again after he or she has had sufficient time to consider this matter more fully.

OVERCOMING OBJECTIONS

Occasionally, you will encounter an objection when making a campaign solicitation. Using the information below as a guide will help you respond appropriately and may even help you receive the gift you suggested. People say “no” for several reasons; they may have misconceptions about what ‘leadership’ giving means; they may have other philanthropic interests and commitments; they may have concerns about the school or effort in general; or they may not think that their gift will make a difference. All of these objections, when handled carefully, are possible to overcome.

Prospect response: “I would love to give a major gift, but with two children in college, it’s just not possible.”

Your response: “I can imagine how having two children in college can tie up your resources. When I made my own commitment, I had similar concerns. But because I consider our school and this opportunity so important, I decided to make a stretch gift.”

Prospect response: “I give to several other charities, so I won’t be able to give that much.”

Your response: “I also support several other charities, but Catholic elementary education and, specifically, (School name) remain my top priority. In order to maintain the excellent work of our school, we rely on the generosity of others. I’m hoping that you will put our school at the top of your list and you will consider a gift of (suggested ask amount).”

Prospect response: “I will not give to the campaign because I am not happy with . . .”

Your response: “I understand your concerns and I would like to resolve this issue. I know that (pastor/principal/superintendent) appreciates feedback from parishioners and friends. If you would like, I will address your concerns with him or her. Either he/she or I will get back to you next week.

FINAL POINTS TO REMEMBER

1. Relax when making your visit. Do not begin talking immediately about the effort.
2. Be a good listener.
3. Remember that you are giving the prospect the opportunity to invest in the future of Catholic elementary education (and their alma mater).
4. Always keep your sights high.
5. Always ask for a specific dollar amount.
6. Depending on the size of the gift request, consider emphasizing pledge payments over a period of years – not the total amount of the gift.
“I would like to ask you to consider a gift of \$10,000 this year, and for each of the next four years, for a total commitment of \$50,000.”
7. Remember to discuss potential naming opportunities (if applicable).
8. Be ready to defer any gift that does not come up to your expectations. Your willingness and ability to do this is the best tool at your disposal.
9. Thank the prospect.
10. Contact the major gift officer to review the results of the meeting, as well as the next steps that need to be taken.