



STEPS IN PREPARING A PERSONAL SOLICITATION

Being prepared to ask someone for a gift is critical to campaign success. Making an appointment for a personal visit, knowing who to bring with you on the visit, what you hope to accomplish during the visit and where to have the face to face meeting all needs to be planned before the ask occurs.

There are some basic components that are part of the campaign solicitation visit. (Same is true for recruiting someone for a campaign assignment.)

1) Know your role, your purpose and your goal.

You are an ambassador of the YMCA. We need you to visit a prospect and:

- Test the prospect's "perception of the Y"
- Tell the YMCA story
- Report back on why the donor gives to the Y

OR

- Report back on what the YMCA needs to do in the future to get a gift

2) Know the Y's cause.

The Y focuses on: Youth Development, Healthy Living and Social Responsibility

Know how financial support from members and the community allows the Y to reach out and impact individuals and additional populations in need of Y programs.

Ask prospects if they know how the Y is reaching out to intentionally to make a difference based on community issues: (Get statistics for your community related to the issues Y programs address)

3) Know the prospect.

Custom tailor each visit to a prospect. Talk to others to find out:

- What is their linkage with the Y (programs, camp, activities, community concern)?
- Why should they be interested in helping the Y make an impact?

TIPS FOR GETTING AN APPOINTMENT

Here are some tips staff can give volunteers for success in getting appointments for donor visits:

- Seek a face-to-face meeting. Stress the importance of meeting in person to discuss "an important effort you are involved in for the YMCA, which affects our community, and you."
- Make a phone call to your prospect to set the date and time for your meeting. Give choices not just an open ended question. Can we meet for coffee at 2:00 on Thursday or 7:30 on Friday?
- Set appointments within days after the kick-off meeting. Half your job will be done.

HINTS FOR PLANNING TO ASK

- Select Prospects Intentionally. To influence the person you are asking, it is key to be a peer of that person or have something in common.
- Make your own meaningful gift first. Donors make the best solicitors.
- Plan for a visit and getting the appointment.
- Avoid Cold Calls- Volunteers should avoid cold calls to people with whom they have no personal connection. Giving is more than a transaction. We want to build relationships and bring donors closer to the Y. Cold calling is one of the least effective ways to ask for a gift.
- Align Request with Interests- Position requests to align with their community interests and prospects involvement with the Y.
- Take a Partner on visits to prospects who are being asked to increase their donations, new requests above a specific amount, or new donors with long-term potential.
- Call the Easiest Prospect First can help gain a sense of momentum and confidence.
- Anticipate resistance in making a visit appointment by personalizing your request. Share how important it is to you. Express that you would really like to come visit them.
- Determine an asking or "hoped for" amount and tie it to specific outcomes the donation can accomplish in people's lives.

FLOW OF A CAMPAIGN SOLICITATION VISIT

Staff and Volunteers often wonder how to plan for a personal visit with an existing or potential donor. Here is the natural flow of a successful visit.

- **Greeting.** The greeting finds common ground during the introductory discussion. Get your prospect to smile and feel comfortable. Start with casual conversation about mutual interests, individuals, programs your kids are in together, and so forth.
- **Share Purpose for the Visit.** There are really two objectives for the personal visit: 1) To share and discuss some important work the YMCA is doing for our community, and 2) To determine how the prospect can contribute to this effort. Ask questions to establish the individual's understanding of the Y.
- **Share Your Commitment.** Share your personal commitment as a volunteer and donor. Knowing that you are volunteering your time is very powerful and gives the case for support credibility. If the prospect trusts your opinion they will believe you when you say this is an important and worthy request.
- **Present the Philanthropic Opportunity.** Explain the impact on lives this campaign effort will make. Share how philanthropic gifts will help make a difference to help solve community issues.
- **Discuss/Question and Answer.** This is the way you can assess their level of interest and they can express any concerns. You need to ask questions about the case for support to make sure there is a good discussion prior to asking for a gift. Make sure the prospect is talking more than you are. Do not be concerned that you will not know all the answers to the prospect's questions. You can say you will refer a question to someone at the Y who can follow up with the answer.
- **Ask.** Ask the prospect to consider a specific gift amount. If you can share that you have pledged to give the same or more and why, that is powerful. If there is a matching gift option, mention it. Discuss how payments can be broken down (\$20-\$100 a month can allow someone to give a larger gift than they might think). Discuss payment options your Y offers (credit card, bank debit, check, online, etc.). If there is a challenge gift, now is the time to mention it.

- **Wait.** Be silent and wait for a response. The prospect needs time to process what you have said and ask their questions.
- **Respond to Concerns and Questions.** Empathize with any concerns and ask, "If those concerns could be addressed would you be willing to join me and others in supporting this effort?" Make sure you summarize how their concern will be dealt with, and when they can expect someone to get back with them. Confirm how they would like to be contacted related to the issue (phone number, e-mail, letter.). Share when you will follow up with them. This kind of concern for their issue can go a long way in building a platform for a future gift even if they do not choose to make a gift at this time.
- **Thank.** Express gratitude even if a gift is not secured. Remember that a "no" usually does not mean "no not ever." If you have told the story of how the YMCA impacts community issues you have accomplished your first objective. After the visit, send a personal note of thanks for their time and consideration no matter what the result.
- **Confirm.** If a gift is secured, assure that the pledge card is filled out with the proper information. Let them know that they will receive a reminder notice (30) days prior to the times they requested to make payment.

No matter the outcome of the visit, take pride in what you have done. Many individual lives are touched by the Y annually because of people like you!