POINTING THE WAY
The Campaign for Meadville Lombard

LEADERSHIP TEAM POCKET GUIDE

SETTING THE STAGE:
SEEKING SUPPORT FOR A WORTHY CAUSE

Congratulations!
You’ve agreed to be part of making something very important happen at Meadville Lombard for the benefit of students, their family members, School faculty and staff, and the entire community. As a Leadership Team member, you can be proud of the role you play and the organization you represent. You can also be sure that no matter what happens, the people you visit with will admire your efforts. What’s more, if you follow these guidelines, your prospects will be better educated about the School and feel more engaged. And even if they decide not to give to this campaign, they will likely be closer to saying “yes” the next time they are asked!

Formula for Success
The “secret formula” for fundraising success is simple:
  ask the RIGHT person
  for the RIGHT amount
  at the RIGHT time
  in the RIGHT way
  for the RIGHT cause.
Of course, if it were really that easy, everyone would agree to be a campaign volunteer! However, the more you know about these five “rights” as they relate to your prospects, the higher the chances that he or she will say yes to your request.

Some Things to Keep in Mind
Having the right frame of mind can make asking for a gift not only more successful but also a lot more rewarding. Here are a few things to remember:
It’s not about you – it’s about the School and the difference it makes in students’ lives and in our community.
You believe in this cause – tell your own story about why Meadville Lombard is important to you. Your personal passion is more powerful than all the right “techniques.”
Being nervous is natural – it’s OK to be a little anxious about asking for gifts but don’t worry, your prospects will be sympathetic! It’s more important to be genuine than perfect.
Use the buddy system – taking another volunteer or a School staff member on the visit with you will make the meeting more enjoyable – and more successful!
Listening is powerful – remember that you have two ears and only one mouth, so try to listen twice as much as you talk.
Face-to-face works best – asking someone to consider making a significant gift is best done in person. Taking time for a face-to-face meeting is worth your prospect’s time, and yours too!
The best “asker” is a donor – you empower yourself and become more credible once you have made your own gift to the campaign.

Do Your Homework
The first step in any successful solicitation is doing your “homework” before you visit with a potential donor. Meadville Lombard staff is prepared to help you with this. They will provide you with contact and background information about your prospects and all the project-related information you might need, including a personalized proposal packet.

They can also help you put together a “cultivation plan” for each prospect. This is a series of activities designed to help your prospect become acquainted with the campaign, understand why it is so important, and help identify how it matches with their personal philanthropic values.

Practice Makes Perfect
No matter how experienced you may be in asking for money, it’s always a good idea to talk through a solicitation visit before you meet with a potential donor. The staff can help you decide who should say what during the meeting. They can also arrange a brief practice session for you and your team members. This will help eliminate any pre-meeting butterflies and assure that your visit goes as smoothly as possible.
**MAKE AN APPOINTMENT**

In many cases, setting up an appointment with a potential donor may be the most difficult step in the entire solicitation process.

One way to make this easier is to be with the person at a meeting or event. Mention that you’d like to get together with them in the next week or so and that you’ll be calling to set up a time. This helps break the ice for your call.

**Think positively** – start by thinking positively and taking a deep breath before you pick up the phone.

**Introduce yourself** – as a volunteer for Meadville Lombard.

**Ask for half an hour, not for a gift** – don’t be tempted into making the ask over the phone. Explain that this request deserves more consideration than that and/or that you need enough time to discuss the ask.

**Be flexible** – you’re busy and so are your prospects. If they say they are too busy to talk now, determine a better time and say you’ll call back.

**Call the staff** – after you set up the visit, be sure to call the School staff and let them know the day, time and place so that they can prepare materials and help you get ready for the meeting.

**THE SOLICITATION VISIT**

Plan to arrive a few minutes early to meet your team members and go over your game plan. Once the meeting starts, follow this general outline for the visit:

**Opening** – allow a few minutes for small-talk to break the ice and get the conversation going. Confirm how much time the prospect has for the visit.

**Engage the prospect** – ask open-ended questions to get the prospect talking about the School and to confirm his/her interest in the campaign’s projects.

**State your case** – say why this is important to you personally and why you are investing your time and money. Describe how the campaign will make a difference in the lives of current and future students, as well as improve our community as a whole. Use some of the Key Message statements and/or the giving opportunities sheets. Share the VISION for the future of Meadville Lombard.

**Listen actively** – for which aspects of the campaign hold the most interest for the prospect and for how his/her values match with the mission and programs of the School.

**Ask for the gift** – ask the prospect to consider a specific dollar amount, or a gift of $X or more, or a gift in the range of $X to $X.

**Practice the ask (it really helps!)** – before you go to the meeting, write down a few different ways to ask for the gift, say them out loud to yourself, and pick one that sounds natural and comfortable for you.

**BE SILENT** – resist all temptation to talk until after the prospect responds to the request. It’s really only a few seconds even it seems like hours!

**Address objections** – listen carefully to the prospect’s response and talk through any objections that might raise. Maintain a positive attitude and be respectful; never argue or become defensive. If you can’t answer a question or objection then say you’ll find out and get back to them. Then be sure to follow through!

**Offer Alternatives** – mention that pledges can be paid over three to four years and that gifts of stock or other appreciated assets could offer tax advantages and other benefits to the prospect.

**Closing** – set up specific next steps and say that you’ll be getting back in touch with them to follow up. Be sure to say thank you before you leave!

**FOLLOW UP**

**Congratulations** – the hard part is done! Give yourself a pat on the back! However, after the meeting, there are a few more important things to do.

**Send a thank you** – take a moment to jot a quick hand-written note to thank your prospect for his/her time and consideration.

**Report results** – call Meadville Lombard staff and let them know what happened, especially any specific follow-up activities they might need to manage.

**Close the gift** – chances are you won’t hear a definite “yes” or “no” during your visit, so be sure to get back in contact with the prospect to get his/her answer and secure the pledge form (the School can only record a gift after the signed pledge form is received).

**Stay in touch** – anyone who gives has demonstrated a deep interest in the mission of Meadville Lombard. Stay in touch with them periodically to let them know how the campaign is going and remind them that their generosity is making a significant difference in the lives of students and their families.