

CAMPAIGN VISITOR'S GUIDE

Two personal stories. . .

1. *“this one is going to be difficult”*
2. *“come and talk to me if you want to, but I’m not giving”*

Key mistakes that visitors make during capital campaigns:

- *limited pre-visit communication between visitor and donor prospect*
- *visitor’s demeanour suggests lack of preparation and confidence*
- *visitor is afraid of asking or doesn’t know how to ask directly for a gift*
- *visitor assumes donor prospect is familiar with the charity and the need*
- *visitor does not articulate a compelling reason or urgency to give*
- *visitor doesn’t ask if donor prospect has questions*
- *visitor provides little or no information about how gifts will be used*
- *visitor does not provide donor prospect with a specific amount as a suggested gift*
- *visitor has not made his/her own gift to the campaign before asking others*
- *visitor is uncomfortable in the silence and speaks too much, too soon, or inappropriately*
- *visitor misses opportunity to explain his/her passion for the charity and mission*
- *visitor does not assure donor prospect of a high degree of confidence in parish’s leadership and ability to manage the project and all donor gifts*

Issuing a High Quality Invitation:

This document assumes your message and promotional materials are complete and compelling, your potential donor list is qualified, and “ask amounts” are established.

Your message must include a clear invitation to participate!

They may not articulate it, but your donors will want to know:

- *Why should I give you my money?*
- *Why now? Why this? Why this much? Why me?*

Two elements are essential in a quality invitation:

- I. *making a face to face personal invitation*
- II. *asking the donor for a specific “stretch” amount*

It’s helpful to think of the visit as having three main segments:

1. *explanation of the project and its importance to the parish (find an element of the project that you feel particularly passionate about) (approx. 20 minutes)*
2. *time for the donor to ask questions, clarify scope and purpose (listen for clues about donor’s interests, possible level of commitment)*
3. *the “ask” for a specific “stretch” amount (the amount would be carefully pre-determined at a prospect review meeting. If the prospect review meeting has been managed well, we never ask the donor for a gift that is going to alter their current standard of living)*

More about the visit . . .

- Thank the prospect for taking time to see you. Ask where you should sit, and indicate approximately long you will stay. Ask if the prospect has any time constraints.
- Introductions – a good time to listen – ask them about their involvement with the church and what they like about it. Try to avoid dislikes and problems. Ask them how long, types of ministry they engaged in, and listen for clues about their ministry passions.
- Keep your message simple, and speak from the heart. Explain what the campaign is about, and why it is important. Talk about why it is important to you. Mention that you have made your own gift (if you feel comfortable).

How to ask for a gift:

It helps to explain that being a visitor means you have already made your own financial commitment to the campaign.

Ask the prospect for a specific gift. Be direct.

Ask them if they would consider a gift of \$ _____ over _____ months.

If you can't say the amount out loud then point to a figure on the Chart of Giving Standards and ask the donor to consider a gift at that level.

Then don't talk. Be patient and give your prospect time to think.

- Invite the prospect to review their plans with their financial advisor and family, especially if it is a large gift.
- If they are ready to make a decision, ask them to fill in the Pledge/Gift Card.
- If they are not ready, *do not* leave the Pledge/Gift card with them, but ask if you can come by on (date) to pick it up.
- Recap to summarize the meeting, and what you both discussed and agreed upon. If necessary suggest some next steps for a follow up visit based on what you learned.
- *Optional:* Ask if the prospect would like to close in prayer. Don't make the prayer a sales pitch.

Before the visit . . .

- Verify address, directions, and time of appointment. Make sure prospect knows why you are visiting
- Know the Case. Your material should follow a clear progression: values, worth, change, need for help, positive goal, results, and application of campaign funds.
- Check with the rector to determine if there are any *current* pastoral issues that might get in the way of the objectives of the visit.
- Make your own gift. Fill in your gift card completely and give it to the campaign secretary.

An every-member visitation campaign is the best proven way to execute a parish capital campaign, and has several advantages:

- *face to face personal invitations*
- *potential for higher quality training*
- *segmenting - focused efforts on those with highest capacity to give – momentum for later phases*

If a modified every member visitation campaign is required, consider three "tiers":

- *Tier 1: face to face home visits as described above*
- *Tier 2: 4 groups: 4 wine and cheese parties: Group presentations; individual letters with specific "ask amounts, brochure, and pledge cards*
- *Tier 3: direct mail campaign – brochure, letter, pledge card (< \$1.000)*

- ***Making calls to schedule appointments . . .***

- Don't wait! Schedule appointments for all your visits within a few days of receiving the names. Don't call over the dinner hour.
- Verify address, directions, and time of appointment. Make sure prospect knows why you are visiting
- When calling for an appointment, tell them your name and identify yourself as calling on behalf of *_(Church)_*. Tell them that you (or two visitors) would like to visit them to tell them about the campaign. State that you would like to set a time within the next two weeks when you could meet with them for 20-30 minutes.
- Suggest two possible times for a visit and ask them to choose one, or offer an alternate date/time that would work better for them

Possible responses:

"Yes" – then set date and time

"Save your time, it's not really necessary" – It's not a waste of my time. I would like to meet with you. Could we set up a time?

"My husband/wife takes care of that" – Could I speak to him/her? Or when can I call back at a convenient time to speak to him/her?

"I'm awfully busy". So am I. But could we find time in our busy schedules to meet – it will only take 20-30 minutes. Which day would be best for you?

"Just mail the material". We feel that it's really important to deliver the material to you personally. Would (date) be OK for you?

"We're not involved much" or "We give what we can but we don't pledge".

Regardless of your participation, I'd just like the opportunity to meet with you and tell you about our campaign.

"I don't attend the parish any more." We're sorry to lose you but wish you well in your new church. (Update your records)

Review other possible objections and responses following below . . .

If the potential donor still turns down your offer of a personal visit, agree to:

- mail the material to them along with a Pledge/Gift Card and a return envelope.
- enclose a short hand written note encouraging them to consider a specific gift amount.
- follow up

Other possible objections . . .

I have a family and I am not really able to make a gift to the capital campaign.

Agree with the prospect that family needs come first. Ask if they would consider a gift once family needs have been taken care of.

I don't have any extra money.

Gifts do not necessarily require a present outlay of cash. They can be spread over a (one, two, three, or more) year time frame.

I give my time as a volunteer and I don't feel that I have to give my money too.

Thank the prospect for all they do. Without their time we would really miss their contribution. But if we cannot ask him/her, a committed supporter, for a gift then how can we go to others less committed and ask them for a gift?

I would like to designate my gift.

Undesignated gifts are most appreciated because they give parish leadership the flexibility to spend the gift in the area of most urgent need. (If they still wish to designate their gift this can almost always be arranged, but they may wish to consider a designated gift in their will.)

I already give a lot to the parish and to the diocesan capital campaigns.

Again, thank them for their generosity and support over time. Help them to see that their parish campaign gift will help ensure that the local parish ministries that they believe in will carry on.

I'm concerned about the confidentiality of my gift.

Only they and the envelope secretary/treasurer of the campaign will know the gift.

The level of gift you are suggesting is too high.

Yes, we recognize that individuals and families are being asked to stretch. But it is an amount that many in the parish are considering. We need to open the challenge to people at all levels

After the visit . . .

- Write a thank you note.
- Make a call report for yourself while your memory is fresh.
- Make any follow-up phone calls, deliver and materials promised
- Do a self evaluation of the visit. What went well? What would you do differently?

Practice and Role Playing (*highly recommended*)

Roles:

Visitor, prospective donor, and observers . . .

Practice:

- *calling to schedule appointments*
- *visits including making the “ask”*

Discuss:

What went well?

What went not so well?

What would you do differently?

Campaign materials available to visitors:

- ✓ *Case for Support – key messages, reasons why project is necessary at this time*
- ✓ *Roles and Responsibilities*
- ✓ *Project drawings and schematics*
- ✓ *Frequently asked questions + answers*
- ✓ *Financial elements – what project will cost, how donations will be spent, financing charges, bridge financing arrangements and costs*
- ✓ *Timetable for project*
- ✓ *Timetable for campaign*
- ✓ *Chart of Giving Standards and target for the campaign*
- ✓ *Pledge Card and Return Envelope*
- ✓ *Name, Address, Phone number, and “ask amount” for each household assigned*
- ✓ *Procedure for reporting on progress*