

Volunteer Solicitation Guide



Step 1: Preparation

1. Make your own gift first

You cannot ask others to support a cause you have not supported yourself. You will improve your credibility and comfort level in asking others to donate by making a personal contribution, at a significant level for your situation, before you begin talking with others.

Once you have uncovered the reasons you are supporting the organization at a sacrificial or significant level, you will be able to share those reasons and your passion for the cause with others.

2. Attend a volunteer training workshop and read all provided materials

Be sure to fully acquaint yourself with:

- the organization's Case for Support or Campaign Prospectus
 - the need for the campaign and donor support
- specific giving opportunities
- the different ways to fund gifts

3. Consider what you know about the prospects you will be soliciting and develop strategies where appropriate ([See prospect strategy worksheet](#))

- What information will be compelling to them in terms of giving opportunities?
 - How might they be persuaded to give a larger gift or pledge than they have in the past?
- Who should be part of the conversation? You may want to include someone from the development team or organization, or perhaps the spouse or financial advisor of the prospect.

4. Make an appointment

- Depending on how well you know the prospect, consider sending a letter on campaign letterhead first to establish your position as a volunteer for the campaign.
- Follow up with a telephone call to set a face-to-face appointment ([see sample scripts](#)).
- Explain that you must deliver the campaign prospectus and supporting materials in person if possible.
- If you have tried to connect via telephone and been unsuccessful, you may leave a message, send an email, or mail a handwritten note asking them to get back to you.

Step 2: During your meeting

1. Establish rapport; build on past experiences, common friends or acquaintances, and shared interests
2. Thank the donor for his or her past support if applicable
3. Explain your role as a volunteer on behalf of ___Charity___ and why you feel so strongly about the mission and the organization
4. Ask [open-ended questions](#) and allow the prospect to voice his/her opinions and thoughts. This may give you a better understanding of his/her interests and areas of the campaign that will be of most interest. Use your listening skills at least as much as you use your talking skills. (“You have two ears, and one mouth. Use them in that proportion.” KAY SPRINKEL GRACE)
5. Make the case for support. Use the written/printed/draft case to guide the conversation. Always seek feedback from the prospect.
6. If you cannot answer a particular question, say you will get back to them with the answer. Be sure to ask your development office liaison to obtain the answer.
7. You may use this time to explain how you made your gift and for which campaign priority.
8. You may want to share stories of the impact of the charity and how it has helped and is helping meet needs.

Step 3: Closing the gift

1. Make the ask. Ask the prospect if he or she will consider a gift of \$___ to support the campaign.
2. If there is no immediate response, let silence fill the room.
3. Allow the prospect to be the next one to speak, no matter if it feels a bit uncomfortable.
4. Wait for the response:
 - a. **YES:** If your prospect agrees to support the campaign, provide him/her with the pledge card and return the completed card to the development office liaison. If the prospect does not wish to fill in the card immediately, accept the verbal pledge and report to your development office liaison to follow up to obtain the official pledge.
 - b. **MAYBE:** It is not unusual for someone to want time to think carefully before committing to a gift. If possible, obtain a second appointment to follow up before leaving. Otherwise, seek permission to follow up in a week or two.
 - c. **NO:** Thank the prospect for their time and consideration, and express the hope that they will consider a gift at another point in time.

Step 4: After the solicitation

1. Report on progress/outcomes to your committee chair and development office liaison. Use the Campaign Volunteer Contact Report form to record:
 - The date of the contact
 - The response
 - Any gift commitment
 - Follow up required and anticipated date of follow up appointment or call
 - Notes and comments that are relevant to the gift, or the relationship between the prospect and the organization
2. Keep all information concerning the prospect and any information disclosed in conversation confidential.
3. Send a personal thank you note or email to your prospect, regardless of the outcome of the solicitation.