**{Logo of your Organization}**

**VOLUNTEER GUIDE**

**{name of your organization}** wants to make sure that your participation in our annual fund campaign is enjoyable and that you will have fun in meeting current donors and potential ones that believe or will in our mission. This **Volunteer Guide** will help you in preparing yourself to set up visit, ask for a contribution, and follow up after each visit.

Do not be uncomfortable to ask for our help. Our office **{or a specific person, most likely yourself}** will assist you at any time when you email {**me or specific person**} at **{email address}** or call **{phone number}**.

**Your Primary Responsibilities**

* Make your own contribution first so that you will ask others with more confidence knowing you have made your own gift. Explaining your own reasons for making a gift can persuade someone else to do the same
* Contact your assigned prospects. You will be assigned {**number according to your organization’s donor base and prospects. Do not assign more than five}**
* Present the Case Statement and any other campaign material that will be provided to you
* Ask for a specific amount. Do not say “any amount you feel comfortable with or, whatever you want to give”. Donors and prospects prefer to be asked so they can make their own decision.
* Know the facts and figures in the Case Statement and marketing materials. You will become more comfortable with the information as you will meet more people. The more you present and talk about the campaign, the better you will become.

**Preparing for the Call**

• Know as much as you can about the person you will visit

* Review the Case Statement and any other material you plan to present
* Know beforehand the amount you will ask. Feel comfortable with amount.

**Making the Call**

* Ask for the person you are trying to reach. Always set up an appointment to meet in person. Do not attempt to talk about the campaign on the phone.
* Once you meet, reiterate that you are a volunteer for **{name of your organization}**
* If the person is a donor thank them for her/his previous support of **{name of your organization}**. Do not start the conversation by presenting the Case Statement or talking about the campaign. Personalize first. Make the person feel comfortable.
* Once you feel you have started a rapport, start talking about how and why **{name of your organization}** is important to you and why you are a donor yourself.
* Ask for the gift after you feel that the person has shown an interest in the **{name of your organization}**’s mission and acknowledges the great things it provides to your community
* Again, always ask for a specific amount. “Will you consider a gift of $XXXX?” or “whatever makes you comfortable” asking for a specific number.
* After the ask, this is where so many times people want to continue to talk. Do not! Just stay silent (it helps to silently count to five). Let the prospect respond first. If there are some questions or objections, just address them directly.
* If the prospect has not agreed with the ask, try to find the given level prospect feels comfortable with.
* Once the prospect gives you the amount she/he will contribute, make sure you agree on how she/he will contribute. They may want to pay on the spot by check or want to stretch their payment. In that case, fill out with the person the pledge card.
* Very important: try your best to get the pledge card filled out on the spot and leave with it in your hand.
* When someone says to leave the pledge card behind, it may take you a long time to retrieve it. Unless, you and the prospect agree on a specific date and time for you to pick it up.
* Another important thing that most volunteers forget to ask: “Do you or your spouse/partner works for a company that has a matching program for philanthropic gifts
* If the prospect needs more time to think about a contribution, make sure to set a specific time to check back in with them. Agree on the time you will follow up with an email of phone call.
* Regardless on how the call went, make sure you thank them for their time and the opportunity to talk about **{name of your organization}**

**Follow-Up after the Visit**

• Contact our office as soon as possible when you have the signed pledge card or a

check. The faster we receive from you the information, the faster our organization will

send the thank you letter and record it.

* If you knew the prospect prior to your visit, we suggest that you also write a thank you note.