CONDUCTING A PERSONAL VISIT *for*

CENTRAL CONFERENCE PENSION INITIATIVE

A GUIDE FOR CAMPAIGN LEADERSHIP *and* VOLUNTEERS

The General Board of Pension and Health Benefits
Of The United Methodist Church
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Introduction

This guide has been prepared to assist volunteers and campaign leadership of the Central Conference Pension Initiative campaign in asking for gifts to support the pensions of retired clergy and surviving spouses in the central conferences of The United Methodist Church.

Successful visits have four essential components:

1. ***Preparation***
2. ***Scheduling the visit***
3. ***Conducting the visit***
4. ***Handling the follow-up***

Regardless of whether you are preparing to meet with a prospect for the first time or are closing on a gift through a follow-up meeting, there are time-proven principles of successful fund raising that should always be remembered. They can be summarized in the following points:

- People give to people
- People give because they are asked
- People give because of their relationship to the person who asks
- People are generous
- Giving is contagious
- Previous donors are your best prospects
- A specific gift plan yields results
- Always ask for more than you expect to receive

Why Major Gifts?

In any fund-raising effort — and particularly one of this size and scope — the ability to raise large gifts is critical to the successful outcome of the campaign. Major Gifts are important because they:

- Provide significant funds toward the goal
- Set the pace for giving
- Inspire confidence
- Build leadership
- Give credibility to the case
- Create momentum
- Attract other Major Gifts
- Ensure a successful campaign

While fund raising may be a combination of art and science, there is a proven method of obtaining Major Gifts. From developing the right mental attitude through asking for the gift, there is a step-by-step process, which will lead to a high rate of gifts-to-requests and a high average gift.

This formula for success is detailed from beginning to end in the pages that follow.

Preparation

1. Develop the Right Attitude:

Because they are asking for money, often personal money, many volunteers do not solicit as effectively as they might if they were making a major presentation for business purposes. They often do not ask for the gift and leave it to the potential donor to "be inspired" and offer a gift, hoping it will be at the exact level that is needed for success.

Ultimately, the ability to conduct successful Major Gift requests is based largely upon the solicitor's ability to recognize the importance of this effort and to convey it enthusiastically!

2. Know the Case — Know the Facts:

Before making the first phone call to the prospect you have been assigned, review all campaign materials — especially the campaign briefing book or proposal. You should be familiar enough with these materials to answer simple questions about the case.

Also, familiarize yourself with the information contained in this training booklet. This manual has been prepared to provide you with the tools necessary to conduct a successful personal visit.

3. Make Your Own Gift First:

The most important step before asking anyone else to consider a pledge is to make your own financial contribution to the campaign for the Central Conference Pension Initiative. Your belief as an advocate for CCPI, demonstrated through an extraordinary pledge, will make it easier for you to ask someone else to support the campaign.

Scheduling the Visit

1. Think about what you will say:

For example:

"Hello (prospect name), this is (your name). How are you today?"

"(prospect name), I am calling about an extremely important project that involves our entire United Methodist Church. I am serving as a volunteer for this project, which is called the Central Conference Pension Initiative, and I would like to meet with you in person to discuss this effort in greater detail."

"We are free Tuesday evening. Can we come by at, say, 7:30?"

"Great! We'll see you then."

2. A few pointers:

- If possible, involve the spouse/partner in the visit; select a time and place that is mutually convenient for everyone involved.
- Be sure to inform prospects that the meeting should take about forty-five (45) minutes. People value their time and will be able to schedule accordingly.
- Avoid discussing details of the campaign or project over the phone.
- Avoid making the visit in a restaurant, or any public place where there might be distractions.
- <u>Never</u>, <u>ever</u>, ask for the gift over the phone.

Conducting the Actual Visit

1. Setting the Stage:

When visiting a potential donor, it is essential that the proper setting be created for the presentation of the *Case for Giving*. It is recommended that the presentation and gift request be conducted with a great deal of enthusiasm. It should not be rushed or introduced as part of an "*Oh, by the way*" conversation. If a meal is involved, we recommend the conversation take place before or afterward, but we urge you to avoid making the presentation during the meal.

THIS IS SERIOUS BUSINESS . . .

And it is critical that you respect the importance of the campaign, the magnitude of the request for support and what it means for our Church. And, follow the plan.

Share the vision and the gift will follow . . .

You are asking for substantial financial support because this campaign will have a direct impact on the retirement of thousands of clergy in the central conferences. The purpose of your visit is to share this plan for the secure future of those dedicated church leaders, and invite your prospective donors to play a key role in making this effort a success.

2. Opening Conversation:

Start with small talk, and express your gratitude for the meeting.

Body language is important. Smile, be positive!

Explain your own involvement and share your enthusiasm for the campaign. This time should be used to learn more about the people you are visiting, their interests, and the components of the case that might interest them most. After a few minutes, it will be natural to transition to talking specifically about the plans for the Central Conference Pension Initiative campaign.

3. Presenting the Case for Support:

The direct approach is the best approach . . .

When it seems appropriate, you should begin the presentation by saying something like:

> *"Joe and Mary, I am glad that we could get together because I have a very exciting and important matter to discuss with you concerning the Central Conference Pension Initiative in The United Methodist Church. I would like to take a moment to tell you where we are, where we are going, and what we hope to accomplish in the years immediately ahead. I would also like to discuss how you personally might be part of this. But first, let me discuss our situation . . ."*

Step back and let the case walk in . . .

There is an important story to tell. Be sure not to undersell it. For example, you might say:

"Joe and Mary, as you may have heard, there is a tremendous need to provide a secure future for our retired clergy and surviving spouses in the central conferences. In many countries, pensions for these dedicated church leaders are erratic, sometimes barely enough to provide for basic nourishment, and in other places non-existent. As a word-wide and connectional church, we are embarking on an effort to provide a long-term solution to this important need."

If it is helpful, use the campaign case for giving as a guide to explain the specific needs of the Central Conference Pension Initiative . . .

Until now, our Church has not had a plan to provide a system of pension benefits similar to what is available in the United States.

The Central Conference Pension Initiative (CCPI) is designed to become a long-term solution—a foundation for retirement security for those who would otherwise have little or nothing after years of devoted service.

- *Success in the Central Conference Pension Initiative means sacrifice and sharing, welcoming and receiving, covenant and commitment.*
- *The Central Conference Pension Initiative represents an opportunity to strengthen our connection on a global scale as worldwide members of the body of Christ—The United Methodist Church.*
- *Your personal commitment will sustain and encourage these Church leaders as they continue their important ministries and bring hope and renewal to God's people in every place and will provide economic relief to retirees and surviving spouses.*

- *A successful pilot project has already been established in Liberia:*

    - *In January 2007, retired clergy or their surviving spouses began to receive a pension of $55 per quarter. This pension amount is determined on a scale according to clergy status at retirement. Distribution is difficult and requires local cooperation, but every benefit amount released to date has been documented through written receipts ensuring the appropriate pension funds are being received by the intended participants.*

    - *The key to the program's success has been the active participation and contribution of the annual conference in Liberia. Local church leaders update and maintain the list of retired clergy and surviving spouses, participate in the distribution of funds, and financially contribute to the pension program. Without their support, the Central Conference Pension Initiative would be unable to provide the resources necessary to sustain a meaningful program there.*

- ***The creation of pension programs like the one in Liberia to support the central conferences requires a minimum financial investment of $20,000,000. Participation across The United Methodist Church is absolutely necessary to meet this need.***

Use every opportunity possible to personalize these components of the *Case for Giving* to the person or persons you are presenting to. Focus on what you like and why you have supported the project!

4. Making the request for support:

It is important that you are straightforward and specific, and that you make the request very personal . . .

"Joe and Mary, I am hoping that you will consider playing a critical role in our plan to provide for the retirement needs of our clergy in the central conferences."

Be sure to ask for the pledge . . .

"In order to meet all the needs of this campaign, we must receive generous commitments from supporters like you."

Make it personal . . .

"Joe and Mary, while I do not know what you can give, I know your gift will make a great difference. I would like to ask that you prayerfully consider supporting the campaign with a pledge of $50,000 which could be paid over a period of three to five years."

5. S T O P Talking — Wait for a Response!

Your first reaction might be to apologize . . .

You might want to acknowledge that you know this is 'a lot of money' . . .

But the best thing you can do now is . . .

S T O P T A L K I N G

Sure, there might be a few seconds of awkward silence, but you owe it to the donor to not make up his mind for him/her.

Handling the Response/Follow-up:

While each of us will employ our own unique style in presenting the case components for the campaign, the prospects you visit will generally respond to the request for support in one of four ways:

Response 1: *"We want to help, but we really need some time to think about the request."*

If prospects are truly being challenged to make a gift that is significant, a great deal of thought is probably necessary. In fact, this response is the one that you will probably hear *most frequently* during your visits. When responding to their request for more time, it is important to leave on positive terms and immediately schedule a follow-up visit a week or so after the initial visit. <u>**You**</u> must maintain control of the call. For example, you might say:

"I'm glad you want to help, and I know this is a big decision. Why don't you think about this and let's meet again. Can we have coffee next Thursday?"

Response 2: *"$50,000 over five years? Sure, we can pledge that."*

Congratulations! Your presentation must have been extremely compelling.

In this case, thank the donors for their generosity, and assist them in completing their pledge card.

Don't oversell — close the meeting as politely as you can. Thank the donor again!

Response 3: *“We couldn’t do $50,000 — would you settle for a check for $1,000?”*

The goal of this visit is ***not*** to secure a gift immediately; rather, it is your job to present the case, make a specific request for support, and encourage potential donors to consider a gift at a specific level. This is a campaign — not a collection. You should not be looking for a “yes” or a “no” right now — encourage the donor to talk the gift over with his or her spouse, look at his or her financial situation and spend time considering the request amount.

You might say:

“I’m not looking for a decision today, and I know I have given you a great deal to think about. Please spend time considering this request and let’s meet again in a few days. Are you free Thursday? We could meet for coffee.”

Response 4: *“No. We wouldn’t be able to support the campaign at this time.”*

The good news is: this is the least likely response of the four. A refusal of your request should not be viewed as an insult to you personally. Your role in such an instance should be to thank the prospect for their time and leave the door open for a gift at a later point. To do this you might say:

“I appreciate your meeting with me and understand that you are not able to support the campaign with a pledge at this time. The campaign will be continuing for the next few months, so should your situation change, there will be other opportunities to make a gift to the campaign.

Thanks once again for your time.”

We highly recommend:

- Never leave a Letter of Intent or a pledge card with a donor until he or she is ready to complete it! Remove the LOI or pledge card from the packet before the visit so you won't forget!
- Conducting follow-up within an approximately one week time frame. Any longer and you risk undermining the importance of the request by failing to convey a sense of urgency.
- Scheduling the follow-up visit during your initial visit. It's one less phone call. We also recommend that your follow-up visits be conducted in person whenever possible, not over the telephone.
- Leaving a message when calling someone for the first time. It's only polite.
- Smiling. You'll sound considerably more pleasant when you talk, both in person and over the phone.
- Role-playing with a fellow volunteer or Chad Peddicord, your on-site CCS director. This will help prepare you for your visits.
- Getting answers to questions you may not know how to respond to. Please contact Chad Peddicord if there is something you are unsure of. He is available to help you.
- Encouraging donors to make down payments. We suggest 10% — and while no down payment is necessary, initial payments will help to address the immediate needs outlined in the *Case for Giving*.

- Reading the various campaign materials numerous times before your first visit.

- Attending all committee meetings. The campaign office needs to hear from you, and we need to demonstrate success toward campaign goals.

- Speaking enthusiastically about the Central Conference Pension Initiative and the campaign to support it.

- Finding components of the campaign that you personally feel are most important and emphasizing those when you present the case for support. Prospects will listen with their hearts when they know you are speaking from yours!

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