



**PORTER CAESAR, LLC**  
Strategic & Fundraising Counsel to Non-Profits

## **New Hampshire Library Trustees Association**

### **SOLICITATION POINTERS**

#### **A. PREPARATION**

- 1. Before you can ask anyone else to step up to the plate, you must have done so yourself.**
- 2. Think of solicitation or enlistment as a three-step process:**
  - Step 1: Telephone to arrange the visit with plenty of advance notice
  - Step 2: Solicitation/Enlistment visit
  - Step 3: Follow up
- 3. Two is (almost always) better than one.** Having a second volunteer there as backup will help you be more relaxed and be more effective in telling the story and making the ask.
- 4. Show them that what you're asking them is important.**
  - Treat each solicitation as you would any other top priority in your life, according to the time, focus and follow-through that will maximize your chances for success.
  - Having two of you visit will underscore the importance you attach to your request.
- 5. Make every solicitation a top-quality solicitation.** Schedule your visits in a quiet place for a minimum of 45 uninterrupted minutes.
- 6. Invite both members of a couple to the solicitation.** Having only one spouse present is an invitation for the Library message to be lost in the delivery from one spouse to the other.

#### **B. THE VISIT**

- 1. Open your visit with small talk, then move promptly to the purpose of your visit.** Begin by talking about “why we’re here” (to talk about Library’s growth and programming and the important impact it will have on the community), then get right into *why you have chosen to get involved* with the Library. Practice this language, because while you may *think* about it a lot, you need to be good at *saying* it – so you can be LISTENING for their story.
- 2. Lay out your story, using the materials provided.** Walk through the Library materials you have brought along, highlighting the components of the program and mentioning anything that is of particular interest to *you* and *your* family. *Don't* get into reading everything word-for-word; an important part of the solicitation process is the time prospects take to look carefully through the Library materials at their leisure. Develop your own topic sentences, then practice, practice, practice – OUT LOUD!

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3. **Help them see where they (their gift) might fit.** Frame your discussion with a clear presentation of the Standards of Giving chart (if appropriate to this situation) – it outlines the gifts the campaign needs to make this expansion possible. Point out volunteer leaders’ names on letterhead or elsewhere in your materials. Everything is relative, and people like to know where they stand and who else is involved.
4. **Try to listen to your prospect as you tell the Library story.** Learn where their interests may lie relative to the Library and the support you are asking of them. Listen carefully to help them connect *their* “dots” to the Library’s dots.
5. **In making your ask, use language such as:**
  - *We hope you are in a position to consider a gift in the range of \$2,500 this year.*
  - *We hope you are in a position to consider a gift in the range of \$5,000 – which will mean a total of \$10,000 for the Library with the challenge match.*
  - *We hope you will consider joining the Library board for a two-year term beginning this fall.*
6. **Then be quiet. Listen.** It is important to allow your prospect the opportunity to react and process your request through further discussion.
7. **If you have a pledge card, always hang onto it** until the prospect is ready to sign and return it to you on the spot. Nothing burns out volunteer time more surely than the need to pester prospects for returning that pledge card.
8. **Don’t leave that first visit without setting up a brief follow-up visit** the next week. Do whatever you can to get that second, brief visit – we know that some prospects, given several days to reflect on your presentation and campaign materials, will raise their giving sights.
9. **Promptly write your prospects a simple, handwritten thank-you note** expressing your appreciation for their welcoming your visit and for their consideration of your request. Invite questions and include your phone number. Refer back to one of your anecdotes in a handwritten P.S.
10. **Above all, relax, have fun** – you are doing the very best you can to advance a great cause. No one expects you to be expert; in fact, your vulnerability strengthens your credibility.