



**LIVE ON**

BUILD YOUR JEWISH LEGACY

March 9, 2006

*Peer-to-Peer Solicitation  
Training with*

*Dr. Art and Irit Waldbaum*



An initiative to support Jewish community organizations

600 South Cherry Street, Suite 1200 Denver, CO 80246-1712 tel: 303.398.7400 fax: 303.398.7430 [rcfdenver.org](http://rcfdenver.org)



LIVE ON

BUILD YOUR JEWISH LEGACY

He who persuades and  
compels others to give shall  
have a reward greater than  
that of the giver himself.

(Isaiah 32:17)



**LIVE ON**  
BUILD YOUR JEWISH LEGACY

**Reasons people give to endowment**

1. They believe in cause. They were asked!
2. They believe in the cause and have a linkage to it.
3. They believe in the asker.
4. They like the idea of perpetuity. Giving beyond their own life.



**LIVE ON**  
BUILD YOUR JEWISH LEGACY

**Reasons people give to endowment continued**

5. They are dedicated to the specific project or program that the endowment will fund.
6. They can leave a legacy to the community.
7. They like the idea their gift will grow with sound investment and spending practices.
8. They are impressed with the investment advice and management of the endowment.



LIVE ON

BUILD YOUR JEWISH LEGACY

***Reasons people give to endowment continued***

9. They would rather give to your organization than to the government. They want tax advantage.
10. They have a history of giving to endowments and understand the benefits.
11. They seek recognition.



LIVE ON

BUILD YOUR JEWISH LEGACY

***A most likely endowment prospect is ....***

- A person who has already supported the organization.
- A person whose life has been touched by the organization.
- A person who has been a board/committee member, participant as a volunteer.
- A person who is very grateful for the services or programs provided for someone else.
- A person wishing to make a difference.



**LIVE ON**  
BUILD YOUR JEWISH LEGACY

***A most likely endowment prospect is ....***

- A person wishing to leave a legacy beyond his/her own life.
- A person over 50 years old.
- A person with assets that are 10% cash, 90% tangible.
- A person with assets of \$250,000 or more.
- A person who is asked.



LIVE ON  
BUILD YOUR JEWISH LEGACY

**Prepare for the call:**

- Make your own gift
- Know your organization
- Know your case statement
- Know the *Live On* program
- Know your prospect



**LIVE ON**  
BUILD YOUR JEWISH LEGACY

Personal needs and motivation of prospect

+

Organization's programs

+

Solicitor's motivation

=

Successful solicitation



LIVE ON  
BUILD YOUR JEWISH LEGACY

### **Making the call:**

- Telephone should be used only for appointment making
- Identify yourself as a volunteer
- Make sure this is a good time to call
- Thank you for your past support of the organization



**LIVE ON**  
BUILD YOUR JEWISH LEGACY

## ***Making the call ...continued***

- Have your calendar ready
- Have a few dates in mind
- Should spouse be included?
- Location- decide where is the best place for a successful solicitation



**LIVE ON**  
BUILD YOUR JEWISH LEGACY

**YOU MUST SEE THE PROSPECT  
FACE TO FACE.**

**AVOID SOLICITING ON THE PHONE!**



**LIVE ON**  
BUILD YOUR JEWISH LEGACY

## **The solicitation:**

- Be on time
- If meeting at a restaurant- pick up the tab
- Each solicitation consists of 5 parts
  - Opening
  - Stating the case
  - Asking
  - Negotiating
  - Closing



**LIVE ON**  
BUILD YOUR JEWISH LEGACY

***The five parts:***

**1. OPENING**

- establish rapport
- find donor's needs



**LIVE ON**  
BUILD YOUR JEWISH LEGACY

***The five parts continued:***

## **2. STATING THE CASE**

- why give to this organization?
- why give to an endowment?



**LIVE ON**  
BUILD YOUR JEWISH LEGACY

## **People and their assets**

- Most everyone works hard to accumulate assets. Asking for a gift of assets is asking for a very special gift.
- Most everyone has a specific interest or need and will use their money to fund that...can you find it?
- Everyone wants to make a difference in the world...now and beyond their lives...you give them a chance to do that and they will...with their money.



**LIVE ON**  
BUILD YOUR JEWISH LEGACY

***The five parts continued:***

**3. ASKING**

will you consider leaving a bequest, a  
IRA or life insurance policy....?

will you join me in a gift of....?



LIVE ON  
BUILD YOUR JEWISH LEGACY

## *People and their assets*

- Everyone wants to have a legacy for their lives. Endowment can be part of that legacy.
- Money and ego are tied together- thus recognition, thanks and stewardship are essential.
- It's not the money...it's what the money does that matters!"



**LIVE ON**  
BUILD YOUR JEWISH LEGACY

***The five parts continued:***

**4. NEGOTIATION**

when you deal with objection,  
tackle the objection not the donor.



**LIVE ON**  
BUILD YOUR JEWISH LEGACY

***The five parts continued:***

**5. CLOSING**

thank you, thank you, thank you

donor record form

personal note

note from organization