

# **CATHOLIC DEVELOPMENT + QUARTERLY +**

An informational DIGEST to guide development personnel in the emerging field of development.

Volume XII, Edition 4

## **MAKING CALLS**

The first rule and only rule in development is "When in doubt, make calls." Calls are indisputably the most important job that everyone involved in the development program should be doing. Only good things happen when calls are made even if no gift occurs. No gifts will be generated, no mission accomplished and no vision will be attained unless people are making calls. *By the way, everyone should be participating in making calls.*

## **CONVICTION**

The first and most important aspect of making successful calls is your own personal conviction and belief in the mission of the institution. Whether you are the development director, pastor, or a committee member, your own personal commitment is essential. Those who aren't convinced make dreadful calls. People believe that colleges and universities receive large gifts because they are colleges and universities. Colleges and universities are successful because they condition their donors to give through the calling process. That process also includes recognition, reporting to donors and cultivation activities.

A number of years ago the Rockefeller Foundation interviewed 30 donors who had made million dollar gifts to certain charities. The donors cited five reasons:

- conviction as to the institution's merits.
- institution's plans and goals.
- management.
- leadership.
- taxes.

Donors learn conviction from the institution's leaders: bishops, presidents, pastors, principals, board members and development directors.

Making calls isn't about asking for money. Making calls is about inviting people to share the blessings that only God has bestowed on them and that they are called to share. By your invitation only, can they do something, know someone (Jesus Christ) and be something related to the Gospel message. You are bringing Christ to people and people to Christ.

## **MAJOR DONORS ARE CREATED, NOT FOUND**

One question that many people ask when they are involved in development is, "Where do we find major donors?" Making calls is the way to major donors. Part of our firm's philosophy is that major donors are created by inviting them to be part of the institution's mission through their financial as well as spiritual contribution. Most major donor prospects will be current donors to your Catholic institution. They may not be making large gifts now, but have the "capacity" to make large gifts if cultivated and invited.

Most donors do not move from institution to institution, bestowing major gifts when they do move. We all know of large civic institutions that receive support from well-known "civic leaders." Often times, development program thinking tends to be, "If we can only get Mr. or Mrs. Smith involved!" Typically, potentially significant donors are already giving to your institution on a regular basis.

What constitutes a major gift? For some institutions, a major gift is \$50,000; for others it may be \$5,000. For the purpose of this discussion, we will assume a major gift level of \$5,000 and higher.

The following are ways in which to surface Major Gift Prospects from your current donor base:

- Review previous Capital Campaigns going back as far as 10-15 years; list pledges and gifts above \$1,000.
- Compile "Feasibility Studies" from previous campaigns; search for major gift donors interviewed or mentioned in the Study.
- List any and all donors who have made non-cash gifts (stocks, bonds, mutual fund shares, grain/commodities, real estate, etc.) at any time.
- List special "gift option" donors who have responded to special appeals to tuition assistance funds, Catholic Schools Week, table buyers at auctions, large bidders at auctions, etc.
- List Christmas and Year End major donors from previous years. (Remember that 40% of all gifts are made in November and December.)
- Evaluate major donors to any parish arch/diocesan annual appeal, where available.
- Identify all donors and/or families that have ever established an endowed scholarship fund.
- Compile a list of any donors who have made or will make a planned gift (bequest, charitable remainder trust, annuity, lead trust, life insurance gift, etc.) to your Catholic institution.

## **HOW TO MAKE A SUCCESSFUL CALL**

The best way to make a call is to visit with people and tell them what you do and what the institution is doing to advance the Gospel message. Listed below is the perfect scenario for achieving a successful call.

Let's assume that one of your donors made a three-year pledge of \$15,000 to your last campaign. A new campaign is dependent on a strategic plan that won't be completed for another two years. Your goal is to meet with the donor and encourage him or her to continue or "extend" the gift for another year -- a gift of \$5,000. Listed below are the steps involved in this process.

- DETERMINE OBJECTIVES AND CHECKLIST
  - Meet the donor.
  - Thank the donor.
  - Report on the impact of his/her previous gift.
  - Provide status report on current pledge.
  - Propose another year gift of \$5,000.
- CALL SET-UP PROCESS
  - Letter of invitation or phone call to meet and visit.
  - Reason for the visit is to report on campaign, its history and "new plans on the horizon."
  - Remember, if the donor "takes the meeting," that is positive; otherwise move on to the next donor.
  - Communicate location (here, there, central location, restaurant, etc.).
  - Thank-you note confirming the appointment, if necessary.
- MEETING
  - Reminder phone call the day before to confirm date and time.
  - Bring materials for thanking, updating and reporting.
  - Present proposal/gift option of \$5,000 next year after the close of the pledge for "tuition grant, computers, endowment, etc."
  - Proposal can be a one-page outline in a pocket folder with supporting materials.
  - Make the request verbally.
  - Allow them to consider the gift. Don't talk yourself out of a gift. Silence is golden.
  - Determine specifics, follow up, new meeting date, etc.
- FOLLOW-UP STEPS
  - Thank-you note reviewing the meeting.
  - Complete tasks or assignments.
  - Record any information or data in computer systems.
  - Supporting information to donor, if requested.
  - Note new pledge period start date.

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### **+QUARTERLY+ CHECKLIST**

This edition's **+QUARTERLY+ CHECKLIST** will help you prepare to make effective calls. Some important points to consider:

- **Pride** -- Sometimes our own pride and fear of vulnerability stand in the way of making calls. Jesus made Himself vulnerable to save us. We're only asking people to be Christ-

like by sharing their blessing to do His work here on earth. Our pride makes us fear the possibility of rejection.

- **Who is Doing Whom the Greatest Favor?** -- I think you know the answer.
- **No One Wants to Make Calls** -- You must assume that no one wants to make calls; we all try to find any and everything in our power to defer or delay or find something to get in the way. Plow the road and clear out the obstacles!
- **Pledging** -- People make larger gifts when they pledge. Allow start dates for pledges weeks or months into the future and let them carry major gifts in 3-5 year pledge periods unless a major campaign is on the horizon. Then accelerate the payment of the gift.
- **Force Yourself to Make Calls** -- Simple.
- **Types of Calls** -- Calls to thank; calls to update and inform; calls to extend current gifts; calls for new major gifts; calls for planned giving.
- **Calls on Over 55s** -- Whenever calling on someone over the age of 55, bring additional materials on planned giving and work planned giving into the conversation. Ask for a planned gift as well as a gift ask. A planned gift is also a good option if the donor "takes the meeting" but declines to make a major gift.
- **Who Should Make Calls?** -- The best combination is a peer influencer who is a donor and the chief administrator (bishop, president, pastor, principal, director) provided they know what they are doing and will definitely ask during the meeting.
- **Four or Five Call Appointments** -- Have multiple appointments "in the hopper." Don't put all your eggs in one basket. Make sure you always have four or five appointments for personal calls in process at any given time.
- **Role Playing** -- Conduct some role playing of major gift calls right in your own office with office staff, board members, volunteers or administrators.

Remember: Only good things happen when calls are made. We are all "called" by God.

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