Sample Telephone Script for Getting the Appointment

“Hi. This is Name. I’m with Organization. Do you have a moment to talk?

I’m calling for a couple of reasons. First, I want to thank you for your support of ______. We really appreciate all of our supporters. We were able to increase the number of individuals served by 15% last year, because of the generous donations of people like you.

Secondly, I want to find out if you’d be open to seeing me in person when I’m in City next. I’d like to share some information with you about Organization, and also get your impressions about how we’re doing.

Would you be able to meet with me next week, on Tuesday or Wednesday?

If no, “Would another week work better?”

“If still not able to, “May I check back with you in 6 months?”

Important Elements

*Ask for permission to continue the call.
*Express genuine gratitude for any prior support. Demonstrate impact of their support.
*Ask for appointment. Offer several reasons for wanting to meet in person.
*Provide several options for meeting.
*Try not to get a final “no.”
*Provide all contact information so they can reach you by phone if desired.
Sample Email Script for Getting the Appointment

From: Sally Smith  
To: Jennifer Leland  
Subject: Greetings from Sally at Organization Name

Dear Ms. Leland,

I am with Organization, and travel frequently to meet with our supporters. I’ll be in your area next Tuesday and Wednesday, and would love to get an opportunity to meet you. I can let you know about some of the exciting new initiatives we are implementing this year, and also some that are under consideration. We’d love to get your impressions. If you’re free for lunch either day, I’d love to treat you. If not, it need not take long; a half-hour to 45 minutes should do it. Please let me know if one of those days works, or if another time would be better.

Thanks in advance,

Name, Title,  
Organization,  
Address  
Phone Number

Important Elements
*Put your name and organization name in the subject line  
*Body of message should be short and to the point.  
*Ask for appointment. Offer several reasons for wanting to meet in person.  
*Provide several options for meeting.  
*Provide all contact information so they can reach you by phone if desired.
Sample Letter Script for Getting the Appointment

Mrs. Jane Doe  
102 Main Blvd.  
Williamsburg, VA 23185

Dear Mrs. Doe,

I’m writing to introduce myself. I understand you are acquainted with John Brown, one of our trustees. John works tirelessly for Organization, and is very committed to our mission of saving the environment. John suggested I get in touch with you, as he believes you share his passion for the natural world.

Part of my job entails meeting with our friends and supporters, to share how our efforts are having an impact on some specific environmental challenges. We are also seeking community feedback on our current initiatives, as well as some focus changes being considered for the coming year.

I would love to have the opportunity to take you to lunch, or meet with you at your home or office, next week. I am available for lunch on Tuesday the 22nd or Thursday the 24th, if either of those dates works with your schedule. If not, I am free Tuesday, Wednesday or Friday afternoon, for a short appointment – I think a half hour to 45 minutes would be sufficient.

I will call you in the next day or two to make the arrangements. In the meantime, please feel free to call me at the number below if I can answer any questions. I look forward to speaking with you soon.

Yours truly,
Sally Smith  
Director of Major Gifts  
(333) 999-1122

Important Elements

* Use official letterhead to establish credibility.  
* Leverage any known relationships.  
* Ask for appointment. Offer several reasons for wanting to meet in person.  
* Provide several options for meeting.  
* Provide all contact information so they can reach you by phone if desired.
Sample Letter and Questionnaire for Getting the Appointment

Mrs. Jane Doe
102 Main Blvd.
Williamsburg, VA 23185

Dear Mrs. Doe,

I’m writing to you because your giving history shows you care about Organization and believe it’s important to invest in our mission of providing high quality health care to the working poor. For this reason, we need your input and advice.

One of the greatest challenges facing Organization is to increase our current level of private support. With increased unemployment and shrinking wages, coupled with more restrictions on access to traditional health care, there is more need for our services than ever before. We are facing this critical demand at a time when many supporters have had to reduce or delay contributions.

It is clear that if we are to continue to serve the community in this time of need, we must to enhance our fundraising capacity. You can help us shape the future direction of our fundraising efforts by participating in a short donor survey. It will guide us to:

- Better engage and involve supporters and potential supporters
- Understand who gives, and why; as well as who doesn’t give, and why not, and
- Target our fundraising efforts towards the people who want to give and who have the ability to give

I’ll call you in a few days to see if we can find a convenient time to meet. It won’t take more than an hour of your time, and your input will be invaluable as we explore new and creative ways to meet the healthcare needs of the vulnerable members of our community.

Thank you for your support of Organization. I look forward to speaking with you and hope we have an opportunity to meet soon.

Yours truly,

Jerry Connelly
Director of Development
Sample Questionnaire

General:
1. What do you see as Organization’s strengths?
2. How do you feel about the current direction Organization is taking?
3. How do you feel about the leadership of Organization?
4. Are there any concerns or comments you would like me to share with our leadership?

Participation:
1. When were you last in the facility?
   a. For what purpose?
   b. What were your impressions?
2. Would you be interested in attending any of the following activities?
   a. Tour
   b. Educational opportunity
   c. Volunteer training
3. How would you like to be involved with Organization?
   a. Volunteer on a committee?
   b. Help with special events?
   c. Write letters to potential supporters?
   d. Identify potential supporters? (Review a list of names?)

Communication:
1. In the past year, have we communicated too often ____ too little ____ or about the right amount____?
2. Of the following communications you receive, how much of it is valued by you on a scale of 1 (I hate it) to 5 (I love it). Circle “0” if you are neutral, and leave it blank if you don’t receive this or don’t know if you receive it.
   - Magazine
   - Newsletter
   - Annual Fund Solicitation letters
   - Telethon Calls

3. How can we communicate with you more effectively?

Philanthropy:
1. Why do you support Organization? (Select all that apply)
   a. I believe in the mission
   b. Because it “feels” good
   c. Because I want to give back
   d. Because I was asked
   e. Because I trust the leadership
f. Philanthropy is a family value/tradition
   g. Other
   h. Comments

2. Why do you NOT support Organization?
   a. No one has asked
   b. I didn’t know there was a need
   c. I don’t trust the leadership
   d. I don’t have the resources
   e. Other/Comments

3. Do we steward your gifts wisely?
   a. Do you believe we use your gifts wisely?
   b. Do you believe your gifts make a difference?
   c. Do we show appreciation for your support genuinely and appropriately?
   d. How could we improve?

4. How would you like us to demonstrate the impact of your philanthropy?
   a. Something named for you?
   b. Meeting the people you’ve helped?
   c. Receiving a report on how your money was used?
   d. Attending a recognition event?
   e. Becoming part of a “club” or “society”?
   f. Comments/Other

5. Are you aware and knowledgeable about planned gift vehicles?
   a. Have you considered making a gift to Organization in your estate plans?
   b. Would you like additional information?

6. What organizations do you support in addition to Organization?