



“Game On”
Partnership Recruitment Campaign

**Partnership
Recruitment Manual**

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From the Campaign Chair

<Date>

Dear SVP Partnership Recruitment Campaigners,

Thank you very much for your willingness to participate in our ongoing Partnership Recruitment Campaign. I know that you all lead busy lives and this is yet another commitment on your plate, but your involvement is paramount to our success!

This campaign provides the opportunity to have Board members and staff work together to achieve our goals for SVP. We are all working in teams that have goals to meet. This is a chance for us all to get to know each other better! We have a partnership recruitment goal of 12 new partners, with eight weeks in which to achieve it—I know that together we can!!

The attached Training Manual provides you with information, tools and tips to assist you in your efforts. If you have any questions or need help at any time during the campaign, please feel free to call me, your Team Captain; all are happy to help you in any way that we can.

Respectfully,

<Name>

Campaign Chair

Campaign Facts

Theme: "Game on"

Goal: To recruit twelve new partners to SVPaz

Mission: Finding new partners to expand SVPaz

Vision: A stronger SVPaz, with robust and diversified partners.

Fall Recruitment Campaign 2012

Event Name	Location	Day of the Week	Date/Time
Campaign Introduction	Arizona Community Foundation	Wednesday	October 3, 2012 12:00 PM
Report Meeting #1	Arizona Community Foundation	Monday	October 15, 2012 4:00 PM
Education Event: Mayor and Mrs. Stanton Education Discussion	Phoenix Country Club	Friday	October 19, 2012 5:30 PM
Informational Breakfast	Adobe Restaurant	Thursday	October 25, 2012 8:00 AM
Report Meeting #2	Arizona Community Foundation	Tuesday	October 30, 2012 11:30 AM
Report Meeting #3	Arizona Community Foundation	Wednesday	November 14, 2012 11:30AM
Informational Breakfast	Adobe Restaurant	Thursday	November 29, 2012 7:30 AM
Victory Celebration	TPPG HQ	Thursday	December 12, 2012 5:30 PM
Campaign Wrap-Up Meeting	Arizona Community Foundation	Wednesday	December 12, 2012 4:00 PM

Case for Support

Why Conduct a Seasonal Recruitment Campaign?

The primary focus of a Seasonal Recruitment Campaign is to find new members who can contribute time, energy and resources to SVP in a compressed amount of time. Successful campaigns provide the cornerstone for expanding partnerships to non-traditional individuals. These new members not only help to raise funds but give their time and talent for SVP.

What the Annual Giving Campaign Supports

Our partnership has grown to over 60 individual Partners with backgrounds in law, technology, marketing, real estate, management, travel, finance, strategic planning, software development, project management, design, and other fields.

You have been provided with materials to support your efforts. This includes the campaign brochure and other forms of information about the organization. All these documents hold a wealth of information you can give to your prospects. We encourage you to familiarize yourself with all documents provided, as well as this training manual.

Each Partner makes a minimum tax-deductible commitment of \$5,500 each year, for two years. Partners gather together to leverage their time, expertise and resources to create sustainable nonprofits.

Over the course of the past 14 years, SVP Arizona has applied our investment model to more than a dozen investment and review cycles and granted over \$3.8 million in funding to Maricopa County nonprofits.

Partnership Terms

Below are several recruitment terms that you should be familiar with as they may be referred to in your training or throughout the campaign activities:

Prospect

A prospect is a potential partner. Our prospects are friends, colleagues, neighbors, and other individuals who are interested in helping the community.

Partner Investment Agreement

This is the standard form provided by SVP to potential partners. In it an individual will fill out their personal information, the type of partnership they are applying for, their work information and how they prefer to be contacted.

Please assure prospects that email addresses and mailing lists are kept strictly confidential and never shared!

Keys to Successful Solicitations

Although often considered mysterious and frightening, soliciting partnerships for a cause for which you are passionate can and should be a positive experience. Keep in mind the following key points when preparing to meet with your prospects:

Your Commitment First!

This is the most important single thing you can do in preparation for your selling job. Only then will you be able to look each prospect squarely in the eye and persuade him or her to do likewise. SVP knows that the best way to sell commitment is to show commitment.

Your Best Prospect – Your Second Call

This gets you off to a good start psychologically and gives you an even stronger position in subsequent solicitations.

A Personal Call to the Right Person

Personal contact produces superior results. Use the phone to secure the appointment and a letter or email to confirm the results of securing the meeting to discuss SVP on a face-to-face basis. It pays off! Remember not to overlook the important role of the prospect's assistant in scheduling an appointment and in follow-up work. They can work on your behalf.

Although personal contact is and will always remain the *“gold standard”* in donor solicitation, there are other interesting and creative ways that prospects can be engaged to participate in the campaign. In the next section, you will find examples of solicitation strategies. In addition, you will be provided with a sample solicitation letter template, as well as verbiage for an email solicitation.

Flexibility

Flexibility should be the key to your approach. The timing, the place you choose to make your contact, and the method must all be custom-tailored to each prospect. Judge each case individually and plan accordingly.

Know the Facts – Prepare for Questions

Be prepared with reasons why the prospect should support SVP. Each meeting should receive advance thought.

You may also encounter prejudices or criticisms. Answer questions honestly and probe to find out why an objecting prospect feels the way he or she does. Turn negatives into positives by “Yes, but...” and then come in with several positive points with which the prospect will agree. Call Terri Wogan or your campaign chair with unanswerable questions and make sure the prospect receives a satisfactory answer. Remember even if you do not get a commitment; *make a friend for SVP.*

Keys to Successful Solicitations *continued*

Tell Them What SVP is Doing

Marketing is largely a matter of education. Your job is to sell the value of SVPAZ programs, not just to ask them to join. When you appeal to the self-interest of the donor, you are likely to secure a favorable response. The brochure gives examples of the impact different gift amounts can make. When prospects can visualize the end result of their investment, they are more likely to support the cause.

Teams of Two – Better Results

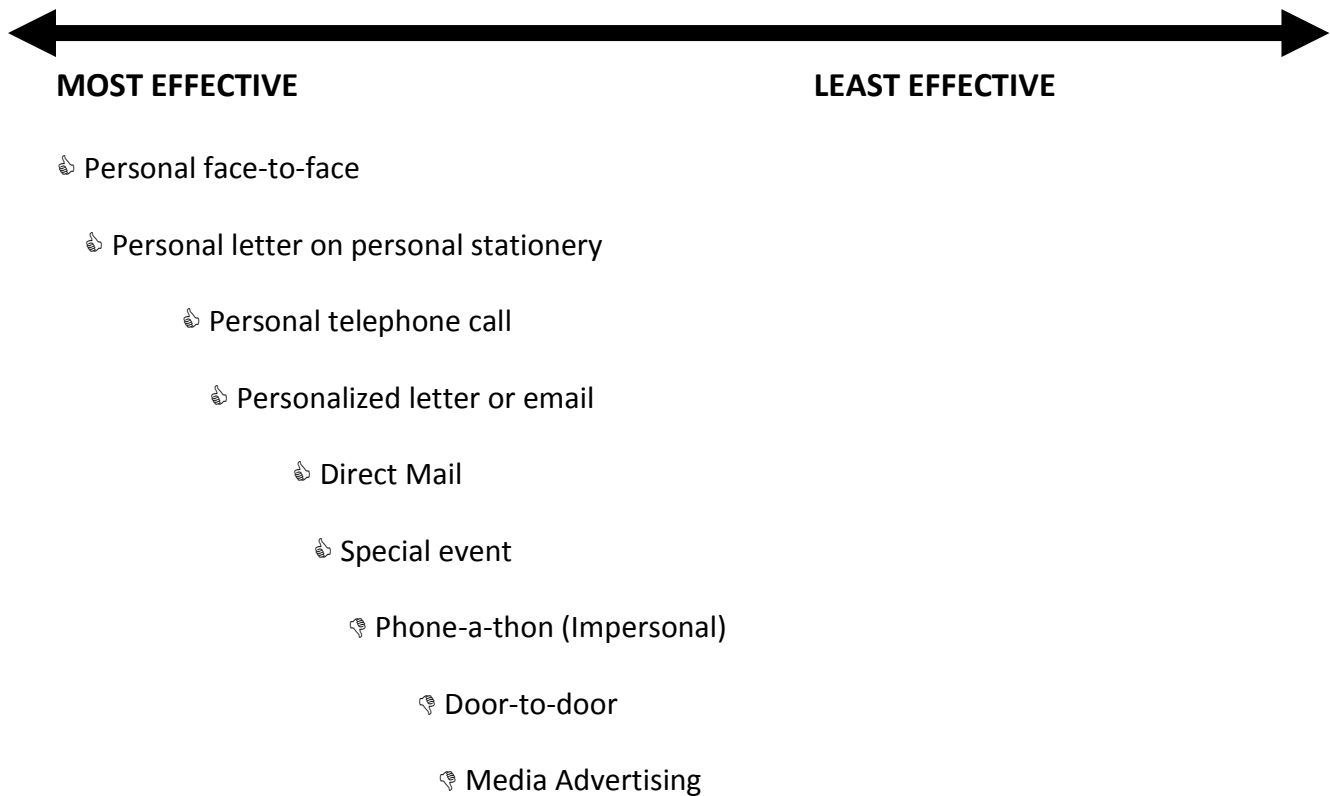
Perhaps you will want to enlist a partner for certain calls, one who has a particularly strong influence with the prospect. You will compliment each other in the meeting. Don't forget your most valuable asset – SVPAZ staff and members.

People Commit to People

Last, but certainly not least, ***never underestimate the power of relationships***. Speak with sincerity and conviction. It's hard for someone to turn down a sincere spokesperson for SVPAZ.

Campaign Solicitation Strategies

The following diagram shows typical solicitation strategies on the continuum from most to least effective. The more “personal” the strategy, the more successful you will be.



Below you will find examples of small events that are easy to conduct and allow for a personalized discussion about SVP:

- Host a small event or invite someone on a tour of an SVP AZ program
- Wine and cheese party
- Poker night
- Tea for friends
- An ice cream social in the office
- Organize a small golf group (2 or 3 foursomes) and play side games to benefit the campaign
- Have a favorite restaurant???? Ask them if they would consider donation of a portion of a day's proceeds to SVP AZ. Invite your friends to have dinner at the restaurant, talk about SVP AZ and ask them to consider joining.

Making the Call

Your most important activity in the Partnership Recruitment Campaign is making solicitation calls. Being prepared, thoughtful, and strategic are key components of success.

Preparation for Solicitation

Select the names of prospects with whom you will feel most comfortable and will be most effective in recruiting.

Before you do anything else:

- Pay your dues
- Be sure you know the organization's facts
- Study your materials
- Get answers to all your questions
- Attend all meetings

Call On Your Second Prospect

Since you are your first prospect, you are now ready to call on the second person(s) on your list. Start at once. The longer you delay – the more difficult your job will be! Pick the one you believe to be your best prospect and mentally review how you will handle the solicitation.

You might consider the following questions in your preparation:

- When is the best time to ask for them to join?
- Should I go alone or with someone?
- If someone should accompany me, who should it be?

Make a Telephone Appointment

"Selling" an appointment over the phone is difficult and requires skill. You must sell the appointment, and not the partnership. Do not give the prospect a choice between a "yes" and "no" answer. "May I drop by and talk with you about SVP?" The prospect's response can only be "yes" or "no". Say instead: "I'd like to drop by and talk with you about SVP. Would Tuesday or Wednesday work for you?" This is a choice between two yeses.

Tell the prospect you **wanted** to call on him or her; don't say you were asked to call. Emphasize the importance of SVPAZ to the community and that you wanted to be the one to talk with him or her because of the prospect's community pride and citizenship.

While you run the risk of being turned down over the phone, it is generally better to schedule an appointment than drop by unannounced. You may run the risk of irritating people and can waste time not catching people at home or in the office.

Making the Call *continued*

The Meeting

A face-to-face meeting is frequently the most successful setting for partnership. A meeting at the prospect's office or at lunch tends to be successful. Trying to combine your SVPAZ discussion with the purpose of a service club or other social or business function is usually not successful.

Start the meeting with discussions on what you have in common. Golf...fishing...children? Common ground helps break the ice. Then say you want to talk about SVP and how it helps persons access our critical health and human services programs and services. ***Relate your own personal SVP experiences that demonstrate the organization's value to the community.***

Below are some questions that help stimulate discussion about SVP:

- Are you aware of SVPAZ?
- What was your first contact with SVPAZ?
- What impresses you about SVPAZ?
- Have you or members of your family been involved with SVPAZ in recent years? Who? How?

Listen for the prospect's areas of interest about the organization, and the reactions, both favorable and unfavorable.

Talk about one or two key SVP programs. This is a perfect opportunity for you to talk about your favorite program. Again, if you have reviewed the campaign materials, given prior thought to why your prospect might be most interested in SVP – plus your preliminary conversation – you should have no problem in touching upon at least one point of interest to the prospect. Weave in information about how the Partnership Campaign, which allows the organization to continue to provide services, is closing the gap between government funding and the cost of programs.

Making the Ask

As you were preparing for the meeting, you decided to ask this person to become a partner. Quickly revisit the meeting up to this point. Do they seem interested? Did the prospect identify or align with anything specific in the organization?

When you make the partnership request, consider using terminology such as, "John, I would like you to consider joining SVPAZ." Whatever verbalization of the request you use, it is important that you ask the prospect to specifically join

After you make your request, sit back and **listen!** Although the silence may seem uncomfortable, it is important that you let the prospect reflect on the request and be the first to restart the conversation.

Making the Call *continued*

Need A Second Visit?

If you're receiving an unusual amount of resistance from the prospect and believe that you can still secure the partnership you've suggested by allowing for a follow-up visit, suggest that a decision need not be made at this time and make no effort to "close."

Before leaving, make an appointment for your next call. It should be made within a week of the first call. Suggest that the campaign is on a strict time schedule (which it is).

If a second call is necessary, reflect on the prospect's attitude toward SVP as well as toward the campaign. What was the prospect's reaction to the proposition? How is he or she likely to want to pay? Are there other special interests that might be useful to share with the prospect? Is help from someone else desirable on your second call? Contact staff for any assistance desired.

Frequently Asked Questions

Individuals today have become much more thoughtful and specific in determining causes they wish to support. Questions about the organization will be specific and thought-provoking. We have provided some examples of frequently asked questions you may experience in your solicitations. If a donor asks a question you cannot answer, simply make a note of the question and tell them you will find their answer as soon as possible. *Remember to follow-up...they may be looking for your responsiveness to their needs as a member.*

How did SVPAZ start?

Social Venture Partners was the inspiration of Paul Brainerd, former Aldus Corporation President, in Seattle, Washington. Jerry Hirsch, a local philanthropist, brought SVP to Arizona in 1999 with the help of additional founding members from the real estate and financial industries, service providers and Valley entrepreneurs.

Where is SVPAZ located?

The SVP offices are located at 2201 E. Camelback Road, Suite 405B, Phoenix, AZ 85016.

Who runs SVPAZ?

SVPAZ is governed by a volunteer Board of Directors. They have responsibility for setting strategic direction of the organization, assuring fiscal responsibility, and securing annual funding. The Board hires the President and CEO, who is responsible for the balance of the staff. The staff, with guidance from the Board, is responsible for delivering SVPAZ programs and services.

How is SVPAZ funded?

SVP is a collaborative fund of the Arizona Community Foundation which is a 501(c)(3).

How are organizations served by SVPAZ?

Social Venture Partners Arizona gathers successful professionals to leverage time, expertise and resources to make strategic investments in the local community. Partners invest in innovative nonprofits, and then actively nurture their financial investments with guidance and resources. Over the course of the past 14 years, SVPAZ has applied our investment model to more than a dozen investment and review cycles and granted over \$3.8 million helping Maricopa County nonprofits.

Frequently Asked Questions *continued*

Why is it important that I inform SVPAZ staff of my prospects?

There are two reasons why SVPAZ would like to know if you have specific prospects you wish to ask for partnership from.

- First, that person might be a prospect for one of your prospects and we do not want you to be embarrassed by approaching someone that has already been asked.
- Second, SVPAZ has prospects for which they are developing or in process of executing a partnership agreement. If we learn you have a connection to a current prospect, we can likely use you in developing the strategy for these requests.

Where will the partners come from?

Partners are being sought from SVPAZ friends, volunteers, businesses, and others interested in supporting this valuable community resource.

How may partnerships be paid?

Partnerships can be paid in full or in installments (e.g., securities, real estate, etc.).

What types of recognition do SVPAZ contributors receive?

Each person receives a personal thank you and appropriate tax documentation at the time of their pledge or donation. In addition, SVPAZ recognizes contributors in the Annual Report and on the website.

What are the social advantages of becoming a member of SVP?

SVPAZ is a group of motivated people who see the value in relationships as they apply to the nonprofit sector. SVPAZ partners come from all parts of the world and work in all sectors. Partners are part of a global community committed to engaged philanthropy. As a group SVPAZ partners learn together, grow together, invest in our community together—and have fun doing it. SVPAZ is committed to maximizing our impact in every way. SVP is dedicated to developing an outstanding partnership of engaged philanthropists mobilized to change our world. SVPAZ is stronger together than we would be alone.

What are the tax advantages of being part of SVP?

SVPAZ is a collaborative fund of the Arizona Community Foundation which is a 501(c)(3) organization with a tax identification number of 86-0348306. Documentation of our tax-exempt status from the IRS is available as needed. Federal and state income tax laws encourage voluntary support of not-for-profit organizations such as SVPAZ. Gifts made to such institutions are tax deductible to the fullest extent of these laws. Note also that securities or other property that has appreciated in value may be contributed with considerable tax benefits.

As with all tax deductions, we recommend the donor check with his/her own tax and/or legal counsel.

Handling Objections

Why should I join SVPAZ?

The programs and services that SVP provides to our community and state are made possible through partners who want to help SVPAZ achieve its mission. That's why we need your support in this campaign.

Business or the economy is not so good – we'll have to wait.

Even though you do not wish to make a payment now, you can set up a payment schedule to fit your needs.

I would like to join, but I have already made up our contribution budget for this year.

Please tell us the best time to ask for your support. When and to whom should a request be made? Can you consider using from discretionary funds?

Why should I join SVPAZ? I am not affiliated with the organization.

Your support is still needed! A partnership in SVPAZ is an investment in an exciting new way to be part of the engaged philanthropy movement in the state of Arizona.

Thank You

Thank you for your hard work and dedication to SVP. Enjoy this opportunity to share your passion and help raise needed funds for the organization. Please do not hesitate to contact the staff with any questions you may have. Good luck!