Western Tradition Partnership

# Western Tradition Partnership

## Strategic Programs Department

## 2008
## "Tour" Manual

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**Version I, July 21, 2008**

# Program Overview

The Western Tradition Partnership's Strategic Program Department combines elements of donor relations and fundraising. Referred to internally and informally as "Tour", Strategic Programs is currently the major focus of WTP's efforts to find and maximize gifts to WTP, mainly from new donors.

WTP's Strategic Programs is different from most other organizations Development operations in that it focuses on a "hard" ask for WTP programs rather than more general donor relations efforts. However, donor cultivation activities can and should be a part of the Tour Program.

The central thrust of the Strategic Programs effort is to raise funds from both current and prospective donors for WTP's Fall 2008 State Grassroots Lobbying Program in Montana and Colorado – accomplished primarily by showing the donor the "Tour" power point presentation.

The Fall 2008 State Grassroots Lobbying Program is an effort to lobby current legislators, as well as candidates for the legislature, and urge them to pledge support for WTP issues in the next legislative sessions.

The role of all the Directors of Strategic Programs is to explain this program to donors and potential donors, excite the donors about the program, and raise the funds that are necessary to carry out this program.

Additionally, the Directors will gather useful information about each donor they meet, update donor records with this information, and coordinate activities with other WTP staff and consultants.

The purpose of this manual is to help each Director and WTP staff member successfully carry out these objectives.

# Scheduling and Preparing for a Trip

Before a Director of Strategic Programs "hits the road", there are a number of things that occur to help make the trip a success. Some tasks are the responsibility of the Director and some are handled by other WTP staff.

### Mail Schedule and Phone Calls

The first step is to mail meeting request letters to prospective donors. These letters notify donors that a Director will be in his area soon and would like to meet with the donor to tell him about an important WTP project.

Appropriate lists of donors will be selected and mailed two letters as follows:

- The first letter to be mailed on the Monday 3 weeks prior to the tentative week of the trip. This letter is from John Sinrud on his personal letterhead, requesting that the donor meet with the Director. ? Why John?
- The second letter, to be mailed 2 days after Sinrud's letter, is signed by an elected official.

### Phone Calls

The Monday after the second letter has dropped (or 2 weeks before the week of travel), Conquest will begin calling to schedule meetings.

The calls should first be made to those with the highest potential for giving. This is determined by the "tier" level assigned to donors. Each donor mailed is given a tour tier rating between 1 and 5. A "tier 1" donor has the highest giving potential, while the "tier 5" donor has the lowest.

Conquest will call the donors starting with the top ones until the Director's schedule is booked. A full schedule is considered to be 4 meetings for a three-day trip and 7 meetings for a 5-day trip – however, a Director can do as many as 18 meetings in a week – this should be the ultimate goal.

If the Director's schedule is not booked by the Monday before the week of travel, a decision will be made as to whether the trip should occur.

This planning will not apply when at least one meeting is set with a donor who can give over $5,000.

Once Conquest has set meeting dates, the Director, or WTP staff member assigned to the Tour, will call to get firm times for the meetings, get directions and confirm the meeting.

## Phone Etiquette

The Director or WTP staff member making these calls should always be polite to the potential donor and thank him for agreeing to meet. A sample telephone script is as follows:

"Hi, Mr. *(insert donor's name)*. My name is (*insert staff members name*) and I am calling from Western Tradition Partnership. I am following up to confirm the meeting set for ( *insert date* ). First, I want to thank you for agreeing to meet, I think you will find this a most informative meeting.

This meeting will take about 30 minutes and I just wanted to confirm the meeting date and set a concrete time. Would (*insert time*) work for you?

A similar script can be used when leaving a voicemail for a donor. In a voicemail or a message left with a receptionist. Make sure to always leave a good call back number.

## Scheduling Meetings

Once a donor agrees to the time for the meeting, you should ask where the donor prefers to meet – at his residence, office, restaurant, coffee shop, etc. Before ending the phone call, make sure to repeat the date, time, and location of the meeting.

All this information must then be put on the Director's calendar. (The Director must make sure that he has shared his Outlook Calendar with all appropriate WTP staff.) You should include the donor's name and phone number, the meeting location, and any pertinent notes. Meetings should be scheduled for at least one hour.

Outlook OR Google Calendar?

The ultimate goal should be to schedule three to five meetings a day for each day of the Director's trip.

After all meetings are set, travel arrangements are made, and ask amounts approved, each director should then get the following information:

- ✓ A detailed daily itinerary from Microsoft Outlook
- ✓ A profile for each donor the Director will meet
- ✓ All other relevant information for meeting contacts (internet research information, previous meeting memos or notes, etc.)

In most cases, Staff Assistants will be responsible for making phone calls. However, all Director of Strategic Programs must be willing to help schedule meetings when Staff Assistants are unable to do so, due to a particularly large number of donors in a certain tour select.

However, the Director's main responsibility is to prepare for the trip by making travel arrangements, determining the appropriate ask amounts, and ensuring he has all the items necessary for the trip.

**Travel Arrangements**

After the Assistant sets at least 3 meetings, the Director is then responsible for making any flight, hotel, and rental car reservations. The Director should give this information to the Assistant.

Flights can be purchased using travel websites such as Orbitz.com, Expedia.com, and Kayak.com. Usually, you should try to purchase the lowest fare possible. However, connections, locations, schedules, etc. should also be taken into account. Directors should always use common sense when booking their flights.

Hotel reservations and car rental reservations can also be made on websites such as Orbitz.com, Hotels.com, etc.

The Director is also responsible for obtaining accurate directions from hotels to the meeting sites. These directions could come from either the donor or from a good map website such as Mapquest.com or Googlemaps.com. (The Director may also take a GPS system on the trip.)

Two to three days before a trip the Director (or the Membership Assistant) will call **<u>only those donors who requested a reminder or confirmation</u>** of the meeting.

**Ask Amounts**

The Director is also responsible for determining the proper solicitation amount. Although there is no exact formula for determining the "ask" amount, a few different resources can help the Director come up with an appropriate figure:

- the donor's history of giving to other causes
- the donor's estimated tour value (as found in Dan Goodwin's tour select information)
- the donor's Wealth Engine report (as found at www.wealthengine.com ).
- any information that can be obtained about a donor from a Google.com search

Generally, it is a safe bet to ask the donor for a MINIMUM of $1,000. However, if Wealth Engine indicates that the donor is capable of a much larger gift than he has previously given, an even greater ask amount is acceptable. Because a personal visit suggests urgent and important business, a Director should not ask for less than $1,000, no matter what.

The Director then creates an "ask sheet" for each donor. The ask sheet is a reply form that includes the donor's name and address, a short memo about the program, and the ask amount, in big, bold numbers.

The Director should use high-quality paper (cream or gray in color) to print an ask sheet for each donor. (See next page for a sample ask sheet.) It is wise to print two ask sheets for each donor, in the event that one sheet gets crumpled. The Director can also keep the second ask sheet which will serve as a future reminder of the meeting and the ask amount.

CONFIDENTIAL    CONFIDENTIAL    CONFIDENTIAL

**Mary Beth Donnelly**
**Vice President, Government Relations**
**Newmont Mining Company**

| | |
|---|---|
| **WTP PLATINUM PARTNERSHIP** | **$100,000** |
| **SPECIFIC REFORM PROGRAM** | **$100,000** |
| **TOTAL REQUESTED PROJECT SUPPORT** | **$200,000** |

# Support Form
## Western Tradition Partnership Legislative Lobbying Program

To: John Sinrud
Executive Director, Western Tradition Partnership
P.O. Box 11894
Bozeman, MT 59718

From: Mary Beth Donnelly
Vice President Government Relations
Newmont Mining
101 Constitution Ave., N.W., Suite 800
Washington, D.C. 20001

Dear John:

I agree, we need to pass mining and natural resources reform in Montana, and the sooner the better. To help you mobilize the grassroots to support our program and get the state legislature on board, I am supporting this program with a contribution of:

**$200,000** **-- the full support you requested.**

$__________ -- other

Card Type: ________ Card #: ____________________________ Exp. Date: ______

## Travel Items

Directors should ensure they have copies of their daily itineraries, travel information, and directions (or a GPS system) prior to leaving for their trip. The Director will also have a "Tour Trip Checklist" and will be responsible for gathering and taking all items as indicated below.

**Director of Strategic Programs Checklist**

Before leaving on tour a Director of Strategic Programs must have:

___ Laptop

___ Personalized ask sheets

___ Stamped reply envelopes

___ Business cards

___ Donor information packet (brochures, press clippings, etc.)

___ Letterhead, envelopes and postage for follow-up letters

___ Print out of follow-up calls to make on the road

___ Correct pronunciation of donor names, companies and cities

___ Schedule of meetings

___ Directions to all meetings (or a GPS system)

___ Donor profile reports

___ Travel information (hotels, rental cars and airline tickets)

___ credit card and cell phone

# Activities during a Successful Trip

After the trip has been scheduled, there is still much to be done to make it a success. At that point, the Director of Strategic Programs takes on the majority of the responsibilities. However, the Staff Assistant is still a necessary part of a successful tour.

## Staff Assistant Responsibilities

The Staff Assistant should be available to assist the Director while he is on the road. Such assistance may include:

- helping the Director with directions in the event of road construction
- calling the donor if the Director is delayed in getting to the meeting
- informing the Director if a meeting has been added, changed, or cancelled

The Assistant must have the Director's cell phone number.

## Director of Membership Responsibilities

The Director of Membership has much to remember while on the road. His most important objective is to get to all meetings on time and to communicate with the home office.

While on the road, all Directors are required to check in with their Assistants at least ONCE per day. Directors must also check in with John Sinrud or John Tate at least once per day to give updates on the meetings.

### Meeting Preparation

Prior to each meeting, the Director is expected to familiarize himself with the donor/contact by reading all provided information. The Director should make sure he knows the proper pronunciation of the donor's name.

If the first meeting of the first day of the trip is in the early morning, the Director should fly or drive into the city the night before, in order to familiarize himself with the area and the exact location of the meeting.

For each meeting the Director should wear a suit and tie. It is best to wear a dark suit (blue, black, or gray) and a conservative tie. Directors should always be well-groomed, alert, and prepared to give the full tour presentation.

All Directors should also be familiar with WTP's programs, budget, and be knowledgeable about other the current political situation, both in the state and nationally.

**Punctuality**

During the trip, the Director is responsible for getting to all meetings – ON TIME. As a general rule, a Director should arrive about 10 minutes prior to the scheduled meeting time if the meeting is at a business, and about 5 minutes prior if the meeting is at a residence.

Should a situation arise (flight delay, traffic jam, etc.) that causes the Director to be delayed, he MUST call the Assistant who scheduled the meeting, and explain the reason for the delay and the estimated time of arrival.

After the Director has talked to the Assistant, either the Assistant or the Director should immediately call the donor and inform him of the delay.

In the unlikely event that a Director needs to cancel a meeting (death, severe illness, cancelled flight) the procedures listed above must be followed. In this case, the Assistant should try to reschedule the meeting.

**Meeting Etiquette**

Directors should strive to make the best impression possible during each visit. A Director may be the only representative of WTP that the donor ever meets.

The meeting is NOT a time to debate or disagree with donors on political issues, religion, or sports. In fact, as a general rule the Director should stay away from any specific political or theological discussions. (Of course, this may not always be possible, and may not be preferable in some cases.)

In essence, the Director should be cautious. He should not get into these discussions unless the donor asks specific questions, or unless the Director already knows where the donor stands on the particular issue.

Of course, the Director should never lie to a donor. If the Director is asked a question that he is uncomfortable about answering, he could say, "my boss does not want me discussing individual issues but wants me to focus on this important WTP program."

Just as each donor is a unique individual, each meeting is also unique. A Director should use his best judgment and common sense in dealing with each donor and each situation.

**Giving the Presentation**

Before a Director can do his job effectively, he must memorize the tour presentation. Each Director should be able to give the presentation in a conversational fashion – so it doesn't sound rehearsed.

Before going on his first trip, the Director will be expected to learn the full power point presentation and present it in its entirety to John Sinrud, or his designee.

Once on the road each Director is responsible for determining, meeting by meeting, how to present the program. On occasion, the Director will not use the power point presentation. Instead he will simply give an oral version of the presentation, highlighting the key points.

There are many different types of meetings; some with small talk, some without, some long, some short, some political in nature, some business-like. The Director's job is to determine, as soon as possible, which type of meeting he is in and how best to handle it.

**How to Make a Polite Exit**

On most days, the Director will be scheduled for more than one meeting, and in some cases will have a very full and tight schedule. It is important that the Director be able to keep to a schedule.

This is always a balancing act. A Director should not offend the donor with whom he is presently meeting, but neither should he be late for his next appointment (or his next flight).

As with other aspects of this program, each situation will be different and the Director must be able to be flexible.

Since the primary goal is to show the presentation, the Director should try to politely cut off small talk if it begins to last too long. The Director may want to state up front that he has only 1 hour until the next meeting.

The Director should also consider the relative value of competing meetings. For example, if a Director is meeting with a potential $50,000 donor and the next meeting is with a potential $1,000 donor, it would make sense to stay with the first donor as long as needed, even if it means delaying, or canceling, the next meeting.

Obviously if the situation is reversed, the Director should make sure to leave the $1,000 meeting in enough time to be prompt for the $50,000 meeting.

# Follow-up Procedures

The most important part of a meeting is the follow-up. The success of each meeting will largely be determined by how thorough the follow-up is. Often, not doing proper follow-up will mean NO contribution, no matter how well the meeting went.

The following sections out line in more detail what follow-up each Director is expected to do after each tour meeting.

## Daily Follow-Up Activities

At the end of each day, the Director should complete two tasks for each meeting: a **Post-meeting Report** (PMR) and a **Meeting Acknowledgement Letter** (or thank-you note).

## Post Meeting Report

A Post-Meeting Report must be completed for each meeting e-mailed to the appropriate Assistant and John Sinrud **EVERY** day. Each Assistant is then responsible for updating the database with the information you provide and scheduling follow-up calls or other activities.

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The Director should fill in as much of the report as possible, the most important information being the Ask Amount, Pledge Amount, and Date of first Follow-Up Call.

The Director **WILL NOT** fill out this report during the meeting. He should make mental notes of what was said during the meeting and fill it out in the car after the meeting or at the hotel that night.

The information for the report can be obtained from a number of sources: conversation with the donor, small talk with the secretary, printed materials in the waiting area, plaques and pictures on the walls, literature and books, etc.

The information requested on the report , as well as the information needed for the memo to the file, can be a helpful guide for starting small talk: "How long have you been in business?", "Is this your only location?", "Are these your children?", etc.

However, the Director should only ask these questions and others like them if he thinks they would be welcome – and if time permits.

It is not necessary to hunt down information just to fill out this report (or to beef up the memo to the file). The Director should just fill out the report as best as he can. (See next page for a sample Post Meeting Report.)

# WTP 2008 Tour
# Post-Meeting Report

**Contact Met With:**

**Company/Foundation:**

**Title/Position:**

**Secretary's Name:**

**Others Attending:** **Name:** **Title:** **Name:** **Title:**

**Meeting Date:** **Meeting Time:**

**Ask Amount: $**

**Company/Foundation Info**

**Employee Size:** **Total Revenues/Endowment:**

**Product:** **Foundation Interests:**

**Check One:**

☐ **Donation in Hand: Amount: $**

☐ **Pledge:** **Amount: $** **Date Expected/1st Follow-up Call:**

☐ **Maybe:** **Date of First Follow-Up Call:**

☐ **No**

☐ **Staff Action Needed:** **What Action?:**

**Additional Comments:**

## Meeting Acknowledgement (TKU) Letter

Within **24 hours** of a meeting the Director must mail an appropriate Meeting Acknowledgement Letter (thank-you note). Timing is crucial.

The Director should write the thank-you note by hand on WTP or his own executive WTP letterhead. The Director should have envelopes and stamps so he can mail these letters from the road. The letters can be dropped in the hotel's mail box or given to the front desk attendant to be mailed.

The acknowledgement letters are very important because they remind the tour contact about the meeting and what was agreed upon. The more time that passes before the tour contact receives a thank-you letter, the less likely he is to make the contribution.

There are basically 4 types of thank-you letters:

- a "Yes" letter thanks the donor for giving the "check in hand"
- a "Maybe" letter thanks the donor for considering a gift and restates important points of the presentation
- a "Pledge" letter thanks the donor for the pledge and reminds them of urgency of receiving contributions for the program
- a "No" letter concedes understanding that a gift is not possible at this time, but restates the importance of the program.

Each letter should include an agreed-upon time to follow up the meeting. Examples of these four letters can be found below.

### "Maybe" Letters

The vast majority of follow-up letters will be "maybe" letters. These are letters to donors who want to consider a contribution or won't commit to a firm contribution amount. The Director, through good follow-up, should be able to convince the donor to pledge and then send a contribution.

In the "maybe" letter, the Director should always mention the specific amount he is requesting. Even if the donor has made it clear that he cannot give the full amount, the director should still allude to it. For example, "While I understand the full $10,000 is not possible, I hope you will consider at least a $5,000 contribution….."

## Sample Maybe Letter

August 20, 2008

Mr. John Tate
1101 N. Highland Street
Arlington, VA 22201

Dear John,

Thank you so much for taking the time to meet with me earlier today about WTP's 2008 Grassroots Mobilization program, already underway.

It was a pleasure meeting you and updating you on Western Tradition Partnership's plans in this vital year.

Thanks also for considering a $10,000 contribution we discussed. I am hopeful you will be able to contribute to this essential mobilization effort.

I will contact you again next week about your decision. Please let me know if I can be of any further assistance to you.

Best Regards,

John Sinrud

## "Pledge" Letters

Of course, it is always better to leave each meeting with a specific pledge. In that case, the Director should send the "Pledge" letter. This reminds the tour contact of the specific amount he pledged.

## Sample Pledge Letter

August 20, 2008

Mr. John Tate
1101 N. Highland Street
Arlington, VA 22201

Dear Mr. Tate,

It was a real pleasure meeting you earlier today, and I greatly appreciate your pledge of $10,000 to support WTP's 2008 Grassroots Mobilization Program.
2010

Your contribution will assist WTP in a massive mobilization effort to change the attitudes of the legislature in (STATE).

I have already notified John Sinrud of your generous pledge and we have included it in the budget for this fall's program.

Again, thank you for your $10,000 pledge and please call if there is any way I can be of assistance.

Best Regards,

John Tate

## "Check in Hand" Letters

Best of all, the Director might get a "check in hand". In that case he should send a modified "yes" letter with a thank you for the specific check amount.

## Sample "Check in Hand" Letter

2010
August 20, 2008

Mr. Chris Younce
1101 N. Highland Street
Arlington, VA 22201

Dear Mr. Younce,

Thank you once again for taking the time to meet with me earlier today.

And thanks also for your generous contribution of $1,000 to WTP's Grassroots Mobilization Program. Your contribution will help us make history in this vital year.

Because of your contribution and those of other WTP supporters, WTP will be able to run one of the most comprehensive and concentrated Grassroots Mobilization efforts in (STATE's) history.

I will keep you updated with any new developments and of course let you know the results of this program.

Thanks again for your valuable contribution to the Grassroots Mobilization Program, and if there is any other way I can assist you please feel free to give me a call or send me an e-mail.

Best Regards,

John Tate

### "No" Letters

The letter that hopefully will be used very little is the "No" letter. Only send this letter out if the donor tells you in no uncertain terms that there is no way he can give you even a dime for the project.

There will be plenty of people who will give you lots of reasons why they cannot give the full amount you are requesting. That is NOT a "no". They are simply saying no to the specific amount. Ask for a smaller amount or for a minimum pledge.

Almost everyone who agrees to take the time to meet with you will at least consider or think about giving a contribution, even if it is smaller than the amount for which you ask.

**Sample "No" letter**

> July 26, 2008
>
> Mr. Chris Younce
> 1101 N. Highland Street
> Arlington, VA 22201
>
> Dear Mr. Younce,
>
> Thank you for taking the time to meet with me earlier today to hear about the important WTP Grassroots Mobilization Program.
>
> As you and I discussed, (STATE) and America are at a crossroads. What happens this year could shape the course of our state and nation for years to come. Every freedom-loving American must take action this year.
>
> Though I understand a contribution for this program is not possible at this time, I hope that you will consider a contribution later to support WTP's efforts to effect the behavior of the (STATE) legislature.
>
> Please feel free to give me a call or send an e-mail if I can assist you in any way.
>
> Best Regards,
>
> John Tate

## Memo to the File

For each meeting, a memo is to be written to the file, CC-ing John Sinrud, John Tate and the Assistant who scheduled the meeting. The purpose of the memo is to communicate to others exactly what happened at each meeting and to serve as a reference tool for future contact with the donor.

All salient events and information of the meeting should be transcribed so that management and all future WTP staffers will know what transpired. To improve memory retention, after each meeting, spokesmen should either make a few quick notes or dictate into hand-held tape recorders the thoughts and information from that meeting.

Every memo should include:

- Date and time met
- Location of the meeting
- City and state
- Company or foundation name,
- Names and titles of any others attending
- Ask amount
- Conversation topics that the donor was excited about
- Any new information about the donor
- Any company or foundation information, such as employee size, endowment size, what the company does, the foundation's interests, number of plants/offices and the states in which they operate
- Any questions, complaints, requests, compliments made by the donor

The Director should NOT include any harmful, snide or overly critical statements about either the donor or WTP.

The memo should always conclude with the date to begin follow-up calls or letters.

It is best to write each memo the night of the meeting, so that the Director can remember as many details as possible. **Memos must be written within TWO WEEKS after the meeting.**

After writing the memo, the Director should email it to John Sinrud, John Tate and the Membership Assistant who scheduled the meeting. The Assistant will then enter the memo into the database.

Every memo should follow the formula contained in the EXAMPLE memos which follows.

## Sample Tour Memo

```
August 15, 2008

MEMORANDUM

TO:         FILE
CC:         JOHN SINRUD, JOHN TATE

FROM:       CHRIS YOUNCE

SUBJECT:    TOUR MEETING WITH MR. CHRISTIAN LEFLEUR
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On Tuesday, August 12, 2008 at 3:00 p.m., I met with Mr. Christian LeFleur at his office in Waukegan, IL.

This meeting was scheduled to show Mr. LeFleur the WTP Tour Presentation and to ask for his support of this program. The ask for this meeting was $50,000.

I arrived at Mr. LeFleur's office about 5 minutes prior to the meeting time and checked in at the front desk. The receptionist gave me a visitor's badge and called Mr. LeFleur to let him know I was there. She then told me to go on up as Mr. LeFleur told her it was OK and I knew where to go.

I walked up the stairs and back to his office and Mr. LeFleur greeted me warmly and asked if I wanted something to drink. I told him no thank you and we started talking about politics right away.

Mr. LeFleur is not very happy with the GOP candidate for President and said he hopes there is someone else waiting in the wings that we just don't know about yet. He said if he had to choose among the current crop he is leaning towards voting for Bob Barr. Mr. LeFleur believes he is about the most "across the board conservative in the race.

We then chatted briefly about Fred Thompson. He is NOT an admirer of Thompson's and said "anyone who has Baker as a mentor cannot be a true conservative. He is very disappointed that so many conservatives seem to be jumping on the Thompson bandwagon.

Mr. LeFleur then said that he thinks the GOP is a real mess right now and the only good news is that the Democrats seem to be imploding as well.

From there he asked me some questions about WTP and how things are going. I spent about 15 minutes filling him in on the formation of WTP and the results of the Montana spring program. He had a number of questions and comments about the program and said he is pleased that WTP is out there doing so much good work because conservatives certainly need it.

We chatted a few more minutes about his business. Mr. LeFleur said it is slower than last year but still growing. He said last year was a phenomenal year for them with growth of about 25%. This year they have seen a 12% growth so he said he really can't complain.

He said that he is, however, seeing clear signs that the economy is not doing nearly as well as some say it is. Mr. LeFleur said in his business he is able to see downturns in the economy before they hit most sectors and he is seeing that right now.

At this point I went straight in to the presentation. Mr. LeFleur listened intently and only had a couple of questions. He seemed very excited by the presentation and once again said it was nice to know someone is out there doing good work.

I asked Mr. LeFleur to make the $50,000 contribution and he immediately pulled out his check book and wrote me a check.

He thanked me for coming to see him and for the "great presentation".

I thanked Mr. LeFleur for his contribution and for his time.

## Follow up Calls

At the end of each meeting (except for those in which the contact gives a contribution) the Director of Membership should attempt to nail down a date for follow up.

The Director can simply say something like, "Thanks for your time Mr. Smith, I will give you a call next week to follow up on your decision".

Once the Director begins making follow up calls to the donor, he should keep calling – every few days – until he reaches the donor. The Director should always leave a message with his phone number so the donor knows who is calling. If the Director is on the road, he should leave his cell phone number.

When calling, the Director must be nice to the secretary, spouse, or other "gatekeeper." Yet, the Director should also be persistent. He should let the gatekeeper know why he is calling and ask for advice on the best time to reach the donor. He may call after hours if necessary.

When a Director finally reaches the donor he can simply say, "I just wanted to follow up on our meeting on July XX and see if you had made a decision on supporting our 2008 Grassroots Mobilization program with a contribution."

If a donor says yes, the Director should thank him and get a firm dollar amount and an estimated timeframe in which the contribution will be sent.

If the donor says he has not made a decision yet, it is very important that the Director ask, "When would be a good time to check back with you?" This should be followed by, "I'll check back with you on XXXX. I hope we can count on your help."

The Director should continue following up until he receives a "yes" or "no" answer – even if it takes a year. Some of the best contributions come in after months and months of follow up calls.

When making a follow up call, the Director should note the date, time and the result of the call. This information should be entered into the Tour

Master Report and the database. If a second call needs to be made, the Director should put that call on his Outlook Calendar for the appropriate date.

**After Receiving a Pledge**

If during the follow-up process, a donor makes a pledge, the Director should send out the appropriate pledge letter. He should also make a record of the pledge in Raiser's Edge and the Tour Master Report.

These actions should be taken immediately. The letter should be sent to the contact even if he or she says the check is in the mail. Donors often forget their pledges, so having a pledge letter on their desk will serve as a friendly reminder.

If a donor assures the Director that a check should arrive by a certain date, the Director will need to begin the follow up calls shortly after that date, if the check does not arrive.

**After Receiving a Contribution**

When a contribution comes in from a donor after a tour meeting, the appropriate WTP staff member alerts the appropriate Director about the gift. The Director immediately makes a phone call to thank the donor. The Director should also write a thank you letter if he does not reach the donor directly or cannot leave a voicemail. He should then update the staff member with the actions taken.

The staff member then updates the Tour Master Report with the gift amount. It is also a good idea for each Director of Strategic Programs to keep his own master list of each donor he has met, the follow-up actions he has taken, and the final result of each meeting.

**The Tour Master Report**

Additionally, a staff member is responsible for updating the Tour Master Report (TMR). The Assistant enters the meeting date, donor's name, ask amount, and meeting result into the Excel spreadsheet.

An example of the tour master report is found on the next page.

| Director | State | Contact | Meeting Date | Ask | Meeting Result |
|---|---|---|---|---|---|
| RD | IN | Roy V. Maxson | 02/16/07 | $2,000 | Check in hand |
| RD | NC | Mr. Jay L. Peters | 01/03/07 | $5,000 | $5,000 pledge |
| RD | TX | Mr. Leo C. Hearn | 03/28/07 | $2,000 | Check in hand |
| RD | TX | Mr. Irvin C. Hatridge, Jr. | 03/29/07 | $1,000 | Maybe |
| RD | NM | Mr. Edward David | **ask sheet** | $500 | |
| RD | CA | Mrs. Ann Pecota | 03/07/07 | $1,000 | Will send something |

Within two weeks of the meeting, the Director should also email a "Tour Memo" to the Membership Assistant. The Assistant is responsible for entering the memo into the database.

# Conclusion

This manual has laid out the responsibilities of all Staff Assistants and Directors of Strategic Programs. It is important to remember that Tour is a team effort. Every person's efforts are necessary to raise as much money as possible for WTP, in order to advance the conservative cause.

If any new member of the Tour team has any questions after reading this manual, he or she should not hesitate to ask.