

Getting Volunteers to Reveal Knowledge of Wealth

Whether you ask volunteers to rate prospects in a large meeting or one-on-one, you will frequently find them reluctant to give you firm dollar amounts. First, they may not really know a prospect's giving capacity that well. Second, as a prospect themselves they may be hesitant to share what they know with you. Below are a different formats you can use with volunteers that tend to give you the info you need. Keep the number of categories low.

A simple, low, medium, high rating. Define these levels verbally.

- Low
- Medium
- High

Use giving categories you may already have.

- Founder (gifts of \$10,000+)
- Benefactor (gifts of 1,000 to \$9,999)
- Supporter (gifts of \$100 to \$999)
- Etc.

Use a relative scale

- More than I can give
- Equal to what I can give
- Less than what I can give

Use terms that are not entirely accurate, but express a size

- Annual gift (under \$1,000)
- Major gift (\$1,000 to \$100,000)
- Estate gift (over \$100,000)

Ask your volunteers to help you determine the importance of your station to the prospect:

- One of the most important organizations in this person's life
- One of a number of important organizations
- Of average importance
- They know who we are
- They need to be introduced to us

The nature of a person's wealth is important too, is it liquid or not liquid.

Liquid assets:

- Cash
- Securities
- Investment property

Illiquid assets

- Home(s)
- Business
- Retirement savings