



Greater New Orleans
REBUILDING OUR CITY ~ REVIVING OUR FAITH.
 Unitarian Universalists

316 38th Street, New Orleans, LA 70124
<http://gnouu.org>
 504.483.2918

It's Not Over Yet!



Support GNOUU





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GNOUU Capital Financial Commitment Form

Name/s _____

Address _____

Telephone _____ Date _____

In support of the GNOUU Capital Campaign for Rebuilding and Revitalization

GIFT

I/we plan to give a total of: \$ _____ over the next three (3) years:

Tax Year: 2008 \$ _____ 2009 \$ _____ 2010 \$ _____ 2011 \$ _____

PAYMENTS

I/we plan to pay my/our pledge according to the following schedule:

- Annual payment in _____ (please indicate month).
- Other: Please describe specific instructions on the reverse of this form and a GNOUU representative will contact you.
- 36 equal monthly payments beginning in _____ 2008
and ending in _____ 2011 (please indicate months).
- 12 equal quarterly payments starting in _____ (please indicate year).

PAYMENT METHOD

- I/we would like to make our payments by gifts of stock or property.
- I/we would like to make our payments by check (made payable to GNOUU).
- I/we would like to make our payments automatically from our checking account using the GNOUU website.
- I/we would like to make our payments with our credit card using the GNOUU website.

I/we will make every effort to honor the scope and timing of this commitment, but reserve the right to modify it in the event of unforeseen circumstances.

Signature _____ Signature _____

- I/we grant permission to use our names in support of the GNOUU campaign.



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Name (s) _____ Date _____

Person making the contact _____

Guide to Follow for Doing the Appointment - GNOUU Capital Campaign - 2008-2011

1. Remember, be on time, have your materials organized, and have your first "sharing" question in mind and other information about those you'll be calling on. And be ready to have FUN!
2. After 15-20 minutes of **SHARING** about yourselves, your church community, etc. **PAUSE** and say, "Are you ready to talk about your support for the GNOUU Capital Campaign?"
3. If the answer is "No" you may hear about illness, job, other personal complications, unhappiness with the church or its leadership, etc. Listen carefully and ask if the minister or other leadership know about this, and if not, may you make notes and share with the appropriate people. Usually will say yes. If it's a "no" ask what they want you to do with this information. **At bottom of this sheet, write SEE BACK and make notes as appropriate. Then, when you turn in your commitment form, also include this sheet. If the information has a sense of "immediacy" to it, then e-mail or call the appropriate people and indicate that you've done so in your notes on the reverse side of this sheet.**
4. The second kind of **SHARING** is where you talk as openly as you're willing about your own dedication to the congregation and its vision PLUS how you decided on your gift level for the Capital Campaign.
5. When done, **PAUSE** and say, "Are you ready to look at the Case Statement and the Capital Brochure?" Then **EXPLAIN** by walking them through the key points in the brochure spending most time on the building plans and the Essential Gifts Chart.
6. After completing, **PAUSE**, and say, "Are you ready to **THINK** about your Capital gift?" With this you are moving to the **ASK** - asking them to think about the vision for the future and to consider where their gift might fall on the Essential Gifts Chart if they were to make giving to capital a priority for 3 years (AND 4 TAX YEARS). Do mention giving appreciated assets. Be prepared to discuss giving in unequal amounts each year if that helps them be more generous. Sometimes, even while looking through the brochure (#5) they will say either that they **cannot** give or are **not ready** to make a very generous gift. No matter where it comes, have the discussion then. Ask them gently up to four more things:



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- a. "Is there anything about the vision or plans that you do not support?"
- b. "Do you believe in what GNOUU is doing for our community - both internal and external?"
(you might add here if it seems appropriate that you think they do based on their financial support and involvement in the past - this personalizes it)
- c. "Is the generosity being asked for the right amount **IF YOU COULD DO IT?**"

(this allows them to say that they would want to support GNOUU at that level)

- d. "Is it a timing problem?" If yes, "Might you make a personal commitment to consider increasing your support next year or the following year?" If yes, "May I mention that to our leadership so that someone could check in with you next year?"

If they indicate that they need some time to discuss their gift, 95% of the time this means that they want to talk for a few minutes without you in the room. Ask if you might use the bathroom, go to another room, go outside and walk around the house, etc. If they still need more time, work out appropriate next steps for you to get back with them.

7. If it is eventually a YES, then give them the Capital Financial Commitment Form to complete. When completed, **THANK** them without looking at it. But then review and make sure all correct. Remember, if at or near the top of a range, if it feels comfortable, ask if they might slide into the next range. **THANK** them again.
8. When you get home, do **NOT** pass "GO" - but sit down and write your personal **THANK YOU** note and immediately mail it. This completes the "building community" piece!
9. Then, report your results as requested - to Vicky Vicky@gnouu.org and be ready to turn in your Commitment Form and this sheet IF it has notes below.

NOTES:



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Potential Capital Essential Gifts Chart
2008 Capital Campaign

<u>Range of Gifts</u>	<u>Proposed # of Gifts</u>
\$100,001 or higher	4
\$75,001 - \$100,000	4
\$50,001 - \$75,000	4
\$40,001 - \$50,000	5
\$30,001 - \$40,000	8
\$20,001 - \$30,000	10
\$15,001 - \$20,000	15
\$10,001 - \$15,000	15
\$ 7,501 - \$10,000	30
\$ 5,001 - \$ 7,500	40
\$ 3,001 - \$ 5,000	50
\$ 1,501 - \$ 3,000	60
\$ 1,001 - \$ 1,500	80
\$ 1,000 and less	100
<hr/>	
Total Donor Units _____	425
Total Goal _____	\$2,700,000



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**GNOUU PARTNER CHURCH PRIORITIZED OPTIONS
FOR CAPITAL CAMPAIGN SUPPORT**

(NOTE: With any of the options, GNOUU will provide training, materials and guidance on how to execute that option in your congregation. Also, the potential exists that GNOUU could send a person to take part in the key event of the campaign.)

1. Capital Campaign (3-year payout) for whole congregation

- Commitment over a three-year period
- Approach potential leadership donors and other potential sources of funding in person
- Handle rest of congregation with a "Miracle Sunday"
- Newsletter article to follow the effort giving results and inviting people who didn't contribute yet to do so

2. Capital Campaign (3-year payout) with emphasis potential leadership donors

- Commitment over a three-year period
- Approach potential leadership donors and other potential sources of funding in person
- Handle rest of the congregation with a mailing and financial commitment form/envelope included
- Might culminate in a particular Sunday service where some testimonials, etc. and people are invited to make a gift/turn in commitment form that day
- Newsletter article to follow the effort giving results and inviting people who didn't contribute yet to do so

3. One-time gift effort to support Capital Campaign

- Basically one gift done at the time
- Do a mailing to the whole congregation with a financial commitment form/envelope included
- Might culminate in a particular Sunday service where some testimonials, etc. and people are invited to make a gift/turn in commitment form that day
- Newsletter article to follow the effort giving results and inviting people who didn't contribute yet to do so



G r e a t e r N e w O r l e a n s

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4. **Bring a New Orleans event/fund raiser to your congregation**

- An evening of New Orleans food and GNOUU stories of Katrina and its aftermath - in combination with a fund raiser to support the UU rebuilding and revitalization

5. **Volunteer Efforts in New Orleans**

- Send volunteers to work with the three Greater New Orleans congregations and/or community partners

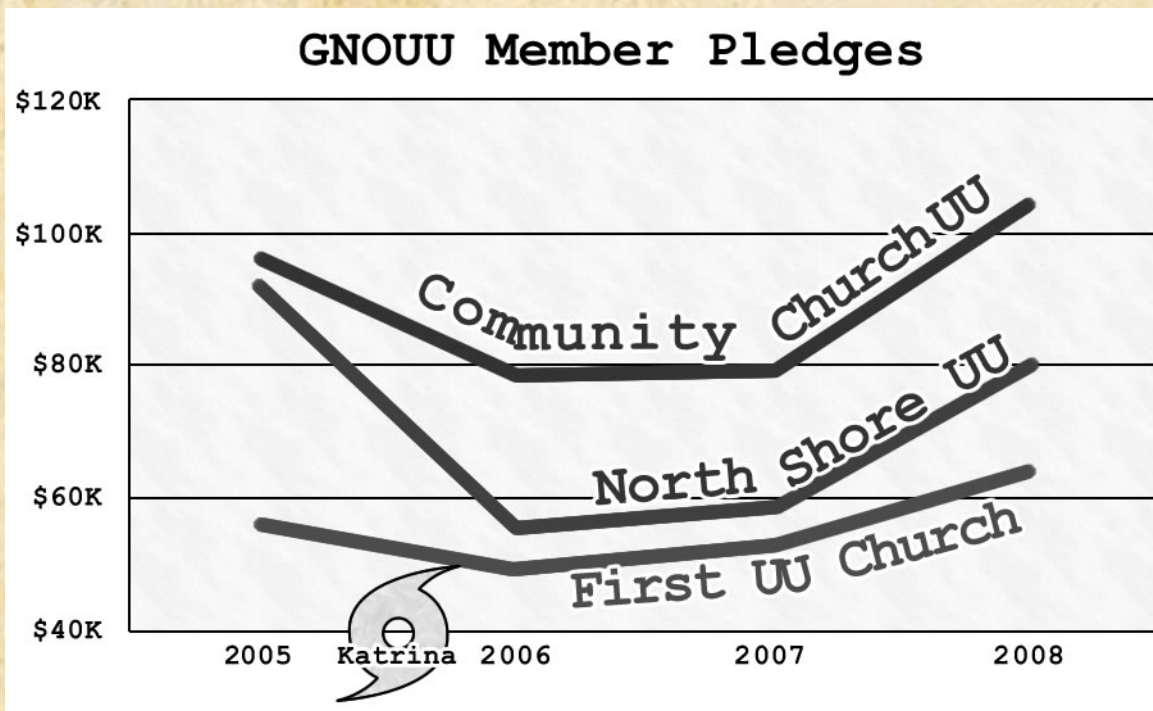
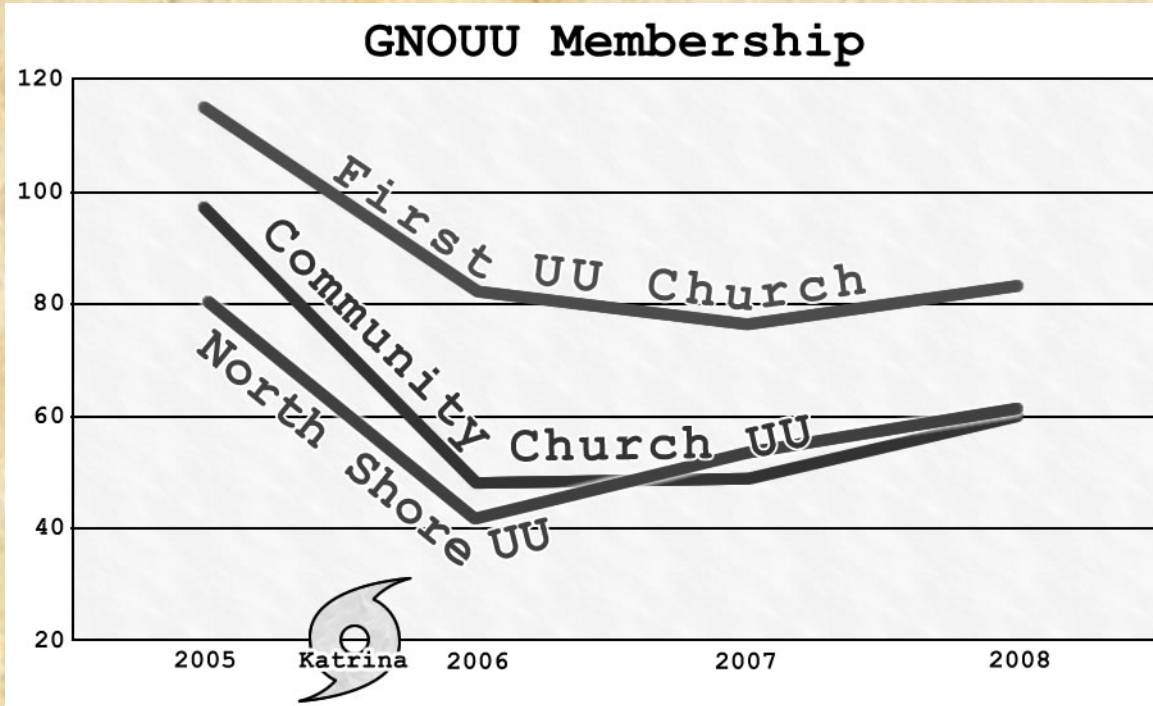
6. **Social Justice Efforts**

- Participate in social justice work by advocating for a just recovery and preventive policies to ensure this kind of devastation never happens again
- Contact your congressional representatives every time there is a Katrina Recovery or Hurricane/Flood protection policy bill being discussed



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SCHEDULING THE APPOINTMENT

(Learn something about those assigned to you - ask Campaign/Congregation Leadership, minister or DRE and make your calls right after the orientation workshop)

1. Hi, this is _____ from the church/fellowship/congregation, etc.
2. Is this a convenient time to talk?
. (If not, ask when YOU MIGHT CALL THEM BACK (not them contact you))
3. I will be your visiting steward for the upcoming GNOUU Capital Campaign and we're asking some key people this year to participate in person-to-person meetings because of the importance of this effort.
4. This call is about scheduling an appointment where we can sit together for 45-60 minutes to talk together about any questions you might have about the campaign and to gain your three-year financial commitment to support the rebuilding and revitalization efforts.
5. The plan for this campaign has an three congregation kick-off event in April of this year, (give details about it), followed by special Sunday services in each congregation the next day and cottage meetings to follow over the next several weeks to receive other people's financial commitments.
6. I'd be happy to meet with you (two of you) for 45-60 minutes either in your home, or you're welcome to come to mine, or maybe you'd like to go to lunch after the service (or such other options as you might think about - remember to think about children situations and that you do NOT want the meeting to be at the church. Might you have some time on _____ ? If not look at other options within the time frame.
7. *If you start getting hesitation about a person to person meeting you can say things like - this is not designed as a confrontational meeting - it really is about building community throughout the congregation by getting to know each other better, sharing our dreams for our expanded facilities, etc. (Think about specific reasons you would enjoy being with these particular people -- that you can share with them and have this in mind ahead of the call.)*
8. Assuming agreement to a time and place, thank them and suggest that before the appointment, they read through the campaign brochure that will arrive ahead of the meetings.
9. A few days before the scheduled appointment, call and confirm the time and place with them. Check that they received the brochure and particularly ask them to look at the Essential Gifts Chart. If didn't get/can't find the brochure you might want to arrange to get them one.
10. Now, some people are just going to really resist an in person meeting and say that they would prefer a cottage meeting format. Don't give up too easily on the in person meeting but in the end you may have to assign them to the cottage meeting pool.



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GNOUU CAPITAL CAMPAIGN S.E.A.T. New Orleans, LA

When contacting people it is important to remember these four letters that form the word SEAT. If you follow these steps your contacts can be fun. It should also help to bring you closer to the person whom you are meeting.

Share -- some of your personal commitment in support of GNOUU and this particular campaign. Let people know that you think that it is important and why! Give people an idea of the process you followed in determining the size of your capital commitment. Let them know in some fashion the size of your commitment:

1. Tell the actual dollar amount.
2. The number of times bigger your capital commitment is than your annual giving level.
3. Where your commitment falls on the Essential Gifts Chart.

Explain -- any aspects about GNOUU or the campaign that the person you are meeting with has questions about. Be prepared to answer such questions by doing your homework. Make sure people understand:

1. Their capital commitment is for a three year period, but it's also four tax years - 7/1/08- 6/30/11.
2. People cannot reduce their commitment to the annual operating budget to make a capital campaign gift. If their finances allow only one level of giving, it needs to be to the annual.
3. Discuss gifts of appreciated assets and the ability to give in uneven amounts over the life of the campaign - e.g. more in years 2 & 3.

Ask -- people for their commitment to the Capital Campaign. Make sure there is a clear break between discussions about the campaign and asking for their commitment. Ask if there are any more questions or areas they want to discuss. When finished, then do the following:

1. Ask the person if they are ready to make a their commitment,
2. If they are ready, hand them the financial commitment form. If not preprinted, make sure to have already listed their name, address and phone number. Handle the form as an important document.
3. Make sure they understand how to complete the commitment form.
4. Take the commitment form from them when it has been completed.

Thank -- them for their gift as you accept the financial commitment form, without looking at the amount. Then review the card with them for clarity. When you get home, immediately write them a brief personal thank you note for sharing their time with you and for their gift. Thank and write them even if they do not make a gift!



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WHAT DO I ASK FOR?

When conducting a Capital Campaign one question that is commonly asked is "How much should I give?"

Here are some suggestions on how to answer it:

1. Tell \$ amount, the number of times bigger your capital gift should be than your annual, and where the person comes out on the Essential Gifts Chart.
2. A recommended minimum is \$1000, or three times your annual commitment, whichever is larger.
3. A commitment of \$1/day is \$1095 when paid over 3 years.
4. Think about the importance of this project to the life of the 3 congregations for years to come. The gift is only for a three-year period. Stretch and help make a difference!

How can I give?

1. Cash is the most common way to fulfill your commitment.
2. Some people prefer to pay their commitment with stocks. You do not want people to sell the stock themselves if it has appreciated. Rather they should give it to GNOUU because of likely tax benefits if the congregation sells it.
3. Some people also give "whole life" or "universal life" insurance policies. GNOUU is not looking for term life insurance policies: rather those with a cash value that can be sold.
4. People may offer real property (car, house, real estate, etc.) but you need to do the following if someone does that:
Thank them very much for their generous offer and tell them that all gifts of this sort must first be considered by GNOUU and you will refer their offer to the appropriate person who will contact them soon. Ask that they call you if they haven't heard from someone in a timely fashion.

Then make sure that you do your part and immediately transmit the offer through the appropriate campaign leadership.

Remember

1. For those people who itemize on their taxes, it does not cost a dollar to give a dollar!
2. People need to give until they feel good about the size of their gift.
3. The capital campaign is a commitment for three-years which can be paid between now and June 30, 2011! That's also four tax years!