

Solveres Nonprofit Launch Kit

The Solveres Guide to Successful Implementation For Your Nonprofit Organization

Utilizing the Solveres R Pledge

**Where Nonprofits can benefit from future real estate transactions
through today's relationships**

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Nonprofit - Guide to Success

Solveres offers this simple, easy to follow Launch Kit to help guide you through the phases of the Solveres System that are essential to effectively implementing the program to raise money for your organization.

Solveres provides advice on fundraising, training and support for Program Coordinators, campaign materials including sample donor letters and newsletters, the Solveres R Pledge, assistance in presentations, participation at special events, ongoing communication by newsletter to donors and nationwide nonprofit and donor support.

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HOW AND WHY THE SOLVERES SYSTEM WORKS AND WHO BENEFITS

Nonprofit Benefits

1. Nonprofit benefits from income now and in the future.
2. Nonprofit gains from the revenue of 15% Pledge on the Listing side and another 15% on the purchase side in the 40 States where Commission Credits are legal for Buyers Agents.
3. Near term opportunity - 10% of homeowners will sell a home this year and purchase another home. One out of every 10 homeowners that the nonprofit signs up will likely sell in the next year.
4. Our program is analogous to a Planned Gift, in that the homeowner agrees to use a Solveres Realty Advisor when they sell their home - now, this year, or in the years to come - and the Pledge is distributed per the donor's instructions.

Donor Benefits

1. The real estate sales commission rate is capped at 6% or the then-current real estate commission rate.
2. Homeowner develops a relationship with a real estate advisor today. Regular communication through mail or e-mail will let the homeowner know they're only a phone call or e-mail away if they have any realty needs.
3. The agent now becomes an advisor to what may be the homeowner's largest financial investment. This advisor is someone they know and trust when they eventually decide to sell their home.
4. Yearly Homeowner's Annual Report provided by adviser to inform homeowner about what's going on in their community.

Solveres Realty Advisor Benefits

1. Gain a customer that will use them when they sell / buy their home.
2. This is not a lead: It is a Pledge that they can count on.
3. Provides a book of business and annuity stream, with near-term, mid-term and longer-term business.

4. Saves precious time and marketing dollars by gaining clients in advance.
5. Convert past customers into future business that they can bank on.

Solveres Benefits

1. Solveres benefits from 5% of the commission.

The Solveres Program Coordinator

What is the Solveres Program Coordinator and why do you have one?

Your Program Coordinator will become the liaison between Solveres and your nonprofit group to ensure a smooth implementation process. For the program to be successful for your organization, it will help to have someone knowledgeable about the program to guide your members and be there for any questions they may have.

Who is a good candidate?

Volunteers that are passionate about the mission of the nonprofit and widely recognized throughout your organization are ideal candidates. These respected leaders encourage member participation and are committed to the success of the program. For example, volunteers currently involved with select committees are likely to be good sources for enlisting early adopters. Members most passionate about your mission - whatever it may be - will most always be interested in volunteering time to help the cause. Your principal donors make an excellent choice for using our R Pledge. Leveraging that as an endorsement for the program, you generate greater interest and conviction across your organization.

What are the duties and responsibilities?

The Program Coordinator is responsible for informing and education members of a nonprofit group about the Solveres System and how it can benefit the homeowner and the nonprofit alike. Their first mission will be to get at least 10 supporters to execute the R Pledge. After the first 10 supporters execute the R Pledge, the next 50 will be easier and before you know it, you're building momentum that will eventually help you reach your fundraising goals.

How much time is involved?

The investment of time is minimal, especially when compared to a gala or a walk-a-thon and the return on investment is significantly greater. A couple of hours a week to promote and maintain the program may be all you need and is based on the number of supporters and volunteers actively involved.

How does Solveres support your Program Coordinator?

Solveres provides training and education for your selected Program Coordinator and assists in co-presenting the program to your members.

Solicitation materials are provided to guide you:

- Fliers
- Sample letter
- Newsletters
- Customized link to content on the Solveres website to inform and guide supporters

Volunteer Best Practices

Here are the types of fundraising activities underway at most nonprofits:

1. Donor campaigns and annual appeals (e.g. a letter to the alumni)
2. Newsletters
3. Direct mail (targeted letter outlining program, benefits, and encouraging participation)
4. Website (banner promotion with link to their website)
5. Guest speaker at breakfast meetings, socials, etc.
6. Special events (e.g. fundraising marathons)
7. Use E-philanthropy (e.g. e-mail to solicit gifts for annual fund appeals)

There are many ways to raise money for your program. Here are some general guidelines to keep in mind, no matter what method of fundraising is used:

- Do what you do best! Fund-raisers need volunteers and often hard work. Make sure you are doing something that people will want to do - both

- implementing and participating. Use your creativity!
- Always publicize what you are doing. Some of the best fundraising events have flopped just because people didn't know they were happening! Send letters from the leadership, put information in your newsletters, and have your members tell everyone they know.
 - Always send thank you notes. Workers, advertisers, donors, etc. should all be sent thank you notes that are hand signed. This little piece of good will goes a long way to having repeat supports.
 - Be patient. Rome wasn't built in a day. Start slowly and gradually build your fundraising efforts. A new event might not catch on the first time, but done well it will attract more people the second time around.

Job Description Template for Volunteers

Details: Our Lady of Grace needs 12 volunteers to help us raise money for our building program underway.

Duties: As a volunteer, assist Our Lady of Grace in communicating, marketing and educating our parishioner community about the Solveres System. Personality, attitude and commitment to our cause are more important than experience. All training will be provided.

Skills: Strong communication and interpersonal skills. Call on fellow parishioners and local families within our parish boundaries to encourage their participation in the Solveres System.

Process Flow

1. Nonprofit - Using marketing materials and agreements prepared by Solveres, Nonprofit introduces the, "R Pledge System" to the Donor.
2. Donor - Donor agrees to use a Solveres Realty Advisor or a Realtor of their choice that agrees to honor the R Pledge and the assignment fee of 5% when the R Pledge is converted to a Real Estate Contract.

3. Solveres - Solveres receives the executed R Pledge from the Donor and assigns them to a Realtor.
4. Donor - Donor contacts Solveres when they decide to sell and buy their next home.
5. Solveres - Solveres contacts Realty Advisor.
6. Realty Advisor - Realty Advisor pays Solveres a 5% assignment fee and helps Donor sell home and finds a new home for Donor to purchase. Realty Advisor sends 15% of the commission to Nonprofit.
7. Donor - Donor sends the 15% of the List side to Nonprofit.
8. Nonprofit - Nonprofit receives Donor's pledged donation when: 1. the home sells; and 2. the next home is purchased

Flier - "R Pledge Making a Difference Tomorrow"

Use the Solveres System utilizing the R Pledge *and make a difference tomorrow!*

Someday you're going to sell your home.....and when you do,
you may pay the normal 6% commission.

Use the Solveres System and Solveres will refer you to a Solveres Realty Advisor today or select your own. In return for the opportunity to develop a relationship with you now, Solveres Realty Advisors have agreed to discount a 20% of their commission.

Act today to lock in this offer!

HOW OUR SYSTEM WORKS

When you sign the R Pledge you are establishing an ongoing relationship with your Solveres Realty Advisor. When you're ready to sell or purchase a home

your Solveres Realty Advisor will be there to provide you expert guidance and valuable assistance through your transactions.

WHY OUR SYSTEM WORKS

1. It creates new business for Realty Advisors by securing relationships with customers today.
2. Sign up today - and whether it's next month, this year or years from now - when you sell your home and purchase your next home, you'll receive a discount that you can Pledge to your nonprofit.
3. The Solveres System puts you in touch with a Realty Advisor in your community or you can choose your own. You'll have a trusted advisor you're familiar with to guide you when you eventually decide to sell or buy.

It's Really That Simple! 503-449-7788
Solveres R Pledge

Letter Sent to Donor from Solveres

March 1, 2019

Mr. and Mrs. Frank Maynor
1549 Woodbrook Lane
Ellicott City, MD 21043

Dear Mr. and Mrs. Maynor,

We would like to take this opportunity to welcome you to Solveres. Enclosed is a fully executed copy of your R Pledge for your records.

We look forward to being available to you throughout the years. You have made an outstanding decision and we'd like to reaffirm your benefits:

1. You are entitled to a discount from the sale or purchase of your next home.
2. You Pledged 15% of this discount to a nonprofit group, your nonprofit group will benefit on your behalf as directed by the R Pledge following completion of the real estate transactions.
3. The nonprofit group will forward you written acknowledgment of the donation they receive on your behalf for use in preparing your taxes.
4. You've established an ongoing relationship with a Realty Advisor that allows you to receive a yearly comparative market analysis on your current home as well as receive valuable professional guidance and advice for your other real estate needs.

Solveres is here to provide you with the best customer service available. Should you have any questions today or in the future, you may call our customer service number at 503-449-7788.

Again, welcome to Solveres. We look forward to working with you.

Sincerely,
Solveres Customer Service

Implementation of the Solveres System

Phase 1

In the Implementation Best Practices section, we provide information about the suggested Best Practices for launching a successful fundraising program using the Solveres System. For each Best Practice, we provide descriptions, timing, audience selection, theme or message and some examples.

Telling the story involves more than making the case in a funding proposal or during a visit. The nonprofit must take advantage of every opportunity to enhance the publicity of the particular program. There's a saying among professional fundraisers: *"You can have publicity without fundraising, but you can't have fundraising without publicity."*

Publicity includes press releases, announcements, newsletters, annual reports, annual appeals, audiovisual aids, and every other printed or produced collateral.

But other forms of publicity are also important. The ability to "personalize" your cause and communicate it to your organization dramatically increases the fundraising program's chances of success. It may help to promote a sense of urgency to your supporters to encourage timely participation.

The web is abundant with information and resourceful fundraising links. Here are a few suggested sites to visit:

- The Foundation Center: www.fdncenter.org
- Fundraising Bank: www.fundraising-ideas.com
- ABC Fundraising: www.abcfundraising.com

Example 1: Illustrates the earning potential a donor can contribute to your organization.

If you have a donor base of 5,000 with the following criteria:

1. If 10% of your Donor base Pledges
2. If the average house is valued at \$300,000
3. If the average move is five years
4. If the average Pledge is 15%

Let's do the math:

1. Donor base 5,000 x 10% = 500 Pledges
2. 500 / 5 (Average Move) = 100 Pledges per year
3. Average value \$300,000 x 3% Commission = \$9,000
4. \$9,000 x 15% Pledge = \$1,350
5. \$1,350 Donation x 100 Pledges = \$135,000
6. Each R Pledge is good for 2 transactions: \$135,000 x 2 = \$270,000 per year!

Income based on size of donor base:

1. 2,500 Donor Base = \$135,000 per year
2. 5,000 Donor Base = \$270,000 per year
3. 10,000 Donor Base = \$540,000 per year
4. 20,000 Donor Base = \$1,080,000 per year

10 Steps to a Successful Fundraising Campaign:

1. Nonprofit designates an Solveres Program Coordinator and recruits Volunteers

- Recruiting for Program Coordinator begins
- Program Coordinator is selected to represent the Nonprofit and Solveres
- Place Volunteer Ad in Newsletter, Bulletin, Website or on Volunteer Solutions and Volunteer Match websites.

2. Solveres trains Program Coordinator and Volunteers

- Solveres offers training sessions to Program Coordinator and Volunteers
- Phases of program outlined
- Sample promotional / solicitation materials
- Links to prominent fundraising sites for support and ideas provided

3. If there are prominent real estate agents within your Nonprofit, the Program Coordinator may wish to enlist them as volunteers and name them on the R Pledge as an option for Donor

- Schedule and conduct individual meetings with each of these agents
- Present program, program benefits and gain their support
- Solveres educates and trains Realty Advisors preparing them to

generate R Pledges (these real estate agents can become your best volunteers)

4. First announcement is communicated to the membership publicizing the Nonprofit and Solveres association and introduces the Program Coordinator

- Announcement 1 is distributed via a weekly bulletin, newsletter, or e-mail

5. The Nonprofit's home page is modified to include a small banner ad or button with the Solveres logo

- Short Banner introducing program and providing link to nonprofit's customized link to www.solveres.com/nonprofit/... to be announced
- Show placement of a button and Solveres Logo Link on right side of home page for quick identification and simple navigation

6. A link form the Nonprofit's home page is created

- Customized Letter to Supporters for web page
- Provide a link to www.solveres.com/nonprofit
- Step-by-step instructions
- Solveres R Pledge in PDF format

7. Program Coordinator executes Phase One of Launch Kit

- Use Nonprofit's data base of members and supporters
- Identify the 20 to 30 most influential and ardent supporters
- Conduct telephone campaign using Script #1 to invite members to the orientation session
- Conduct direct mail campaign using Invitation #1 to invite members to the orientation session

8. Orientation Session for 20 to 30 supporters is conducted, Program Coordinator is lead presenter and uses Script #2

- Program Coordinator is lead presenter and uses **Script #2** as his/her entry monologue to introduce program and material to be covered
- Solveres provides secondary support and address questions beyond the scope of Program Coordinator's knowledge
- Materials provided to attendees include:
 - Flier **Overview of Program**
 - **Solveres R Pledge**
 - Flier **How it Works**

9. Once the first 3 supporters have executed the Solveres R Pledge, the Program Coordinator and those 3 get 7 additional supporters to Pledge to reach critical mass of 10

- Follow-up with attendees at Orientation Session
- Direct mail and telephone solicitation to attendees
- **Announcement #2** is distributed to reinforce program
- Send **Sample Donor Letter**
- Make request to the Realty Advisor identified in Step #3 to assist in gaining support of 10 total members

10. Each of the 10 supporters writes their own testimonial or success story, for use in Phase Two

Phase 1 success is realized when 10 supporters have executed the Solveres R Pledge in support of your nonprofit organization.

Now is the time to take advantage of the momentum, leverage the testimonials and endorsements of the 10 supporters, and aggressively develop the opportunity. The Program Coordinator and fellow volunteers / supporters engage the entire membership as you broaden participation in Phase 2.

Announcements for Newsletters and Bulletins for Phase 1

Short announcements relating to the existing mission and goals of the nonprofit organization placed strategically in the weekly nonprofit newsletters and bulletins are excellent opportunities to promote the Solveres program. Frequent and

regular announcements about the program helps your donor community relate to the benefits of pledging significant amounts that qualify as charitable donations. Announcements should be crafted so they can be distributed via printed materials or included as part of an e-mail.

Announcement #1 should be a short attention grabbing announcement publicizing the nonprofit's agreement to participate in a unique program that could really help its supporters and the nonprofit organization (e.g. school, church) at the same time.

Timing of the first announcement should coincide with Nonprofit's signing of the Solveres Nonprofit Pledge Agreement. This is a general announcement to the entire membership introducing the program, identifying the Coordinator and directing them where to go to learn more.

Example:

We have a wonderful new opportunity to raise significant funds. Mr. Program Coordinator will lead the Solveres activity and can be reached at 555-222-1234 or MPC@aol.com You can expect to hear a lot more about this program and in the meantime, be sure to visit www.how.it.works.com to learn more.

Announcement #2 should weave Solveres into a general discussion about stewardship or drawing a parallel between giving and using Solveres as a way to augment -not replace - the nonprofit's current fundraising efforts.

Timing of the second announcement should be within two to four weeks of the first announcement further endorsing the program and encouraging members to consider this contribution vehicle as a way to make a very generous pledge.

Example:

Many of us have seen the bumper sticker that proclaims, "He who dies with the most toys wins." Some of you may also have seen its counterpart: "He who dies with the most toys, still dies." Often in this culture, and particularly in this geographic area, we focus on material things as status symbols - the more we

have, the more important we are. As the second bumper sticker points out, this can be a very shortsighted view, especially in light of the greater reward and goal of eternal life.

Nonprofit and Solveres have teamed to provide our membership with a simple and effortless way to raise significant funds above and beyond the other fundraising programs in place today. Consider pledging the discount from the Solveres system. We encourage you to be thankful for your good fortune and to consider sharing that good fortune by using the Solveres System.

Website content and links

First, on the nonprofit organization web page discussing Support, Stewardship, Giving, Contributions, etc., the following content would be included on that page:

Solveres Program for Supporters

If you use the Solveres Program using your Solveres Realty Advisor, consider pledging the discounts you'll receive when you sell or buy your next home.

Your donation qualifies as a charitable donation! The Solveres Program is available to supporters selling their home next month, this year or even years from now. For more information contact your nonprofits Program Coordinator, Susie Doe - 555-222-1234.

Second, Solveres will provide our logo for the nonprofit to place on their home page announcing the program. By clicking on the logo, a new page will open taking the user to www.solveres.com/nonprofit/org.name

Third, the content on the Solveres web site is customized with your logo and lets your supporters follow simple step-by-step instructions including how to download and complete the Solveres (PDF).

On the following pages you will find:

- A sample letter for the web page
- Customized web page content and logos for a nonprofit organization with step-by-step instructions for supporters

Letter to Supporters From Web Page:

Dear Supporter,

I am pleased to announce our association with Solveres. Solveres has developed a unique program to create a new source of funding for nonprofit organizations. Specifically, every time you sell or buy a home, there's an opportunity for our organization to earn a significant amount of new revenue we never thought possible.

The program is very simple and it doesn't cost either of us a thing. If you've ever used a real estate agent in the past, you may have paid a 6% commission. If you select a Realty Advisor today using the Solveres System, not only will you never pay more than the 6% commission of your broker's then current market rate, you'll receive a discount of 15% when you sell or buy your next home!

For example: If you sell a \$500,000 home and then purchase a \$600,000 home your total discount is almost \$5,000

Realty Advisors save time and money with the Solveres System and have agreed to discount their commission for the privilege of becoming your real estate agent today! If you'd like to pledge all or a portion of your rebate to help support our organization, please follow the simple directions below. And - your contribution qualifies as a charitable donation!

Whether you're selling your home now, next month, this year or years from now, your participation in the Solveres Program can help us raise money.

Thank you in advance for pledging a portion of your discount to us.

Jim Johnson, Director of Development

Sample web page:

Solveres logo here

Insert your logo in this space

Everyone benefits with the Solveres System

Dear Supporter:

I am pleased to announce our association with Solveres. Solveres has developed a unique program to create a new source of funding for nonprofit organizations. Specifically, every time you sell or buy a home, there's an opportunity for our organization to earn a significant amount of new revenue we never thought possible.

The program is very simple and it doesn't cost either of us a thing. If you've ever used a real estate agent in the past, you may have paid a 6% commission. If you select a Realty Advisor today using the Solveres System, not only will you never pay more than the 6% commission or your broker's then current market rate, you'll receive a discount of 15% when you sell or buy your next home!

For example: If you sell a \$500,000 home and then purchase a \$600,000 home your total discount is almost \$5,000

Realty Advisors save time and money with the Solveres System and have agreed to discount their commission for the privilege of becoming your real estate agent today! If you'd like to pledge all or a portion of your rebate to help support our organization, please follow the simple directions below. And - your contribution qualifies as a charitable donation!

Whether you're selling your home now, next month, this year or years from now, your participation in the Solveres Program can help us raise money.

It's easy to donate your future real estate discount to benefit our organization, just follow the simple directions below.

Thank you in advance for pledging your discount to us.

*Jim Smith
Director of Development*

Sign up with Solveres today and help our mission

- 1. Download PDF Nonprofit R Pledge*
- 2. Read the R Pledge, fill out it out and sign*
- 3. Mail the original to:
Solveres
5111 SW Corbett Ave.
Portland, Oregon 97239*
- 4. When the R Pledge is received by Solveres, a copy countersigned by your Realty Advisor and a welcome letter will be sent to you.*

Should you have any questions about the program, please direct them to Solveres customer service at 503-449-788 or by e-mail: info@solveres.com

How the Solveres System works

When you sign the R Pledge, you may choose a Realty Advisor or Solveres will refer you a professional in your community.

In return for the opportunity to begin building a relationship with you now, participating Realty Advisors have agreed to discount a portion of their commission 20%. You can donate your discount to us and benefit from possible tax deductions.

Everyone benefits with the Solveres System

- It creates future business for Realty Advisors by securing relationships with customers today.*
- The Solveres System puts you in touch with Solveres Realty Advisors in your community.*

- *When you sell or purchase a home, whether it's next month or years from now, you'll receive discounts.*
- *Pledging your discount will help further our mission.*

Still have questions about the Solveres System? Call your Nonprofit's Program Coordinator: Susie Doe 555-222-1234

Telephone Solicitation

The Program Coordinator, using the nonprofit's list of largest donors, will commence an awareness campaign via telephone solicitation. This initiative is designed to introduce the Solveres Program, gauge the supporter's awareness, provide additional information in an effort to educate the supporter, determine the likelihood of the supporter selling their home in the next year, and if they would be willing to pledge the discount to the nonprofit.

The Program Coordinator will enlist the support of at least 10 volunteers to make 25 calls per week, with an objective of contacting 200 to 250 members per week. This serves several purposes:

First, it provides further substantiation of the program. The recipient of the call will sense that the leadership supports the program, a Program Coordinator has been appointed, and 10 donors are using the Solveres System, all becoming participants in the Awareness Campaign.

Second, this telephonic campaign gets the word on the street quickly, reinforcing the message of the collateral materials that have been distributed thus far.

Third, a communication channel is established between volunteer and potential donor, eliciting feedback and the potential donor's intentions.

Fourth and most importantly, it gives the volunteer the chance to ask for the pledge. Gifts are solicited; the individual prospect will rarely venture an offer of a gift. It's the role of the Program Coordinator and his/her volunteers to seek the gift. A key to success is to ask in a manner that respects both the donor and the gift.

Script # 1

Telephone Script Inviting Members to Orientation Session

Sample Telephone Script used when you have sent an advance letter inviting them to the Orientation Session

Hello, (prospect's name), this is (your name) from (name of your organization or affiliation). I'm calling to follow up on the letter I sent you. (Or, if applicable, refer to letter sent by your contact, the person who knows your nonprofit and the prospect.) Do you recall receiving that letter?

If the potential donor recalls receiving the letter....

Good. Since you have an idea of the type of work our nonprofit does, I was hoping we could count on you to attend our Orientation Session to learn how you can help make the Solveres fundraising program a resounding success. Are you planning to attend the session next Thursday at 6:30 pm?

If the answer is yes....

(Confirm the date, time, location and length of meeting.) We look forward to seeing you then. Thank you.

If the answer is no....

Have I called too late to get you on our schedule? *If the answer is yes:* When would you next be available to attend a second Orientation Session? *If the answer is no:* What is keeping you from volunteering one hour of your time for our nonprofit to understand this innovative fundraising program?

If they are too busy or disinterested, then say:

I appreciate the few moments you have spent with me on the phone and do ask that you reconsider joining your fellow volunteers to help further our organization's cause. Should you change your mind you can call me or just show up at the Orientation Session. (Confirm the date, time, location and length of meeting.) Thanks again for your time.

If they give you a range of when they would be available for a 2nd session: That's great! We are scheduling the second session now and that is exactly the time frame we are considering to have the meeting. Which day of that week works best for you and what time of day? I will try to accommodate your schedule.

Make sure to capture their available date and time:

Thank you for your time and I will be calling you back with confirmation of the date, time, and location of the second Orientation Session. In the meantime, will you keep this date open for us?

The answer will most likely always be yes:

Very well then. Thanks for blocking that out, talk to you soon.

If the potential donor does not recall receiving the letter....

(If applicable, -name of your contact - suggested that I call you.) If you have a moment, I can tell you what the letter said. (If they say they do not have time, ask what is the best time to call back and then follow through, starting the conversation where you left off.)

To date, we have (fill in with number) of people confirming their attendance at the Orientation Session). That means we have (fill in number) percentage that have already confirmed. We are committed to having 100% representation of the thirty people invited and want to include you as a confirmed participant.

I (we) would appreciate the opportunity to share with you the Solveres Program and how we can generate significant funds for our organization. One of the cornerstones of our success has been the ability to enlist volunteers - like you - to promote our campaigns. Your insight into how we might do this would be invaluable. Do you have time to meet with me and some of your fellow volunteers?

If they agree to meet with you....

(Confirm the date, time, location and length of meeting.) We look forward to seeing you then. Thank you.

If the answer is no....

Have I called too late to get you on our schedule? *If the answer is yes:* When would you next be available to attend a second Orientation Session? *If the answer is no:* What is keeping you from volunteering one hour of your time for our nonprofit to understand this innovative fundraising program?

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Make sure to capture their available date and time.

Thank you for your time and I will be calling you back with confirmation of the date, time, and location of the second Orientation Session. In the mean item, will you keep this date open for us?

The answer will most likely always be yes:

Very well then. Thanks for blocking that out. Talk to you soon.

After each phone call, make good notes about whom you spoke with, the date and time, the level of interest and when you will meet with them. If the prospect did not agree to meet with you, note the reason. File this information in your records on prospects or put a copy in the file started for this potential donor.

Script #2

Program Coordinator Entry Monologue to Introduce Program at First Orientation Session:

PROGRAM OVERVIEW

1. The Solveres System is very simple, effortless to implement, does not cost our organization a thing and is funded from the normal real estate commission paid when buying and selling homes.
2. The System connects consumers with a Solveres Realty Advisor prior to the Listing and the Buyer Agency agreements.
3. Since the Realty Advisor saves marketing time and money and is positioned to create a trusted advisor relationship, the Realty Advisor in return provides a discount to the consumer.
4. The consumer pledges all or a portion of the discount to our organization.
5. The Solveres Program is analogous to a Planned Gift, in that the consumer agrees to use a R Solution Realty Advisor when they sell or buy a home - now, this year, or in the years to come - and the discount is distributed per the donor's instructions.

NONPROFIT

1. Identify a Program Coordinator and Solveres will fully train the Program Coordinator.
2. Conduct a meeting to inform your primary supporters about the Solveres System and get at least 10 donors signed-up.
3. Using the Solveres Launch Kit, Program Coordinator and volunteers promote via fliers, newsletter announcements, website, e-mail, direct mail, and telephone solicitation.
4. Solveres supports you by providing recommendations and guidance, while your volunteers do the work.
5. Leverage your existing fundraising marketing programs - no need to reinvent how you raise money, this is just another way.

PROGRAM BENEFITS FOR...

NONPROFIT

1. Nonprofit organization benefits from donations now and in the future.
2. Nonprofit organization gains from the revenue of the 15% discount.
3. Donor base of 2,500 means \$135,000 of revenue per year; 5,000 means \$270,000 / yr.; 10,000 means \$540,000 / yr.; and 20,000 means \$1,080,000 / yr.
4. Significant fundraising is possible helping with capital improvement campaigns.
5. Analogous to a Planned Gift.

Donor

1. The real estate sales commission rate is capped at 6% or the then-current real estate commission rate.
2. Provides immediate opportunity for donor to pledge a substantial amount to their nonprofit, above and beyond what the donor may ever be able to donate.
3. Donors develop a relationship with a Realty Advisor today, one they already know and trust when they eventually decide to sell their home.
4. Pledge contribution qualifies as a charitable donation - donor may benefit from a tax deduction.
5. If a donor is currently under contract with a real estate agent, then this program does not apply to them.

Realty Advisor

1. Gains a new client that will use them when donor sell and buys a home.
2. More than a lead, it is a committed pledge that they can count on.
3. Provides a book of business and annuity stream, with near-term, mid-term and longer-term business.
4. Saves precious time and marketing dollars by gaining clients in advance.
5. Perceived positively within community by giving back to the communities through the donations.

Solveres

1. Solveres benefits from a 5% fee from the Realty Advisor for managing the systems and overall administration of the program.
2. Within 60 days of Donor's execution of the R Pledge, Solveres may offer the Solveres Vendor Discount Program for a nominal fee, of which 10% shall be donated by Solveres to your Nonprofit.
3. Within 90 days of Donor's execution of the R Pledge, Solveres may inform Donor of opportunity to invite others to use the Solveres System to help your Nonprofit.

Direct Mail

Five strategic uses of direct mail for fundraising include:

1. Growth - Help build a bigger membership or list of contributors: Your donor base
2. Involvement - Persuade your supporters to become actively involved.
3. Efficiency - Maximize the net revenue you derive from your mailings, and thus raising funds at the lowest possible cost per dollar raised.
4. Stability - Reach and maintain an optimum level of direct mail fundraising activity.
5. Visibility - Publicize your work among a particular constituency or the general public.

A direct mail package needs to accurately reflect the organization's mission and the fundraising program while being attractive and memorable in design. Careful use of lists is important, as you want to give those larger more active donors frequent opportunities to support your cause with less frequent mailings for those who are less responsive or who have requested they be approached only once or twice a year.

A targeted and personal direct mail piece - designed to look like an invitation - should be sent to your larger gift donors. The invitation is asking them to attend a special presentation to introduce them to Solveres. These donors can make an even greater impact on the organization because generally donors who already make larger gifts are more loyal and are more likely to make additional gifts.

Effective direct mail pieces include thank you letters and expressions of appreciation in appeal letters, annual reports, and other mailings. For the very large gift donors, highly personalized packages that communicate courtesy and appreciation, and use excellent graphic design and high-quality printing are worth considering.

The following samples are provided:

- Invitation to Learn More
- Thank You Letter
- Letter to Donor

Invitation #1

Dear Fellow Donor,

I would like to invite you to learn more about a wonderful fundraising opportunity that I am leading.

Cancer is a disease that too many families have to deal with. I have decided to do something about it by investing my time and efforts into fighting this terrible disease and hope that you will consider learning about a new program where you can help without writing a check.

I am the Program Coordinator for the Solveres Program - an effortless and effective way to raise sizable funds for our cause. As active volunteers, we have made a difference for many, yet many others still need our help.

With your continued support, we can develop even more programs to meet the needs of patients, families and oncology professionals - the people who deal with cancer every day and the people who care for them.

Please join me for a one-hour meeting at 6:30 pm on Tuesday, March 9th, at our Washington location and learn how you can help make this fundraising program a resounding success.

Together, we can help to improve the quality of life of patients and their families.

I look forward to seeing you there!

Sincerely,

*David Smith
Program Coordinator*

Thank You Note

Dear Tammy,

Thank you for your recent pledge in support of our fundraising efforts.

Because of your participation in the Solveres System, we will be able to expand our programs, bringing us even closer to meeting the goals of our organization. With your help, we are building stronger and more compassionate communities.

On behalf of the entire congregation, thank you again for supporting our efforts with your generous pledge.

Sincerely,

Jim Thomas, Director of Development

Letter to Donor

Dear Donor,

I am pleased to announce our association with Solveres that developed a unique program to create a new source of revenue for nonprofit organizations. Specifically, every time you sell or buy a home, there's an opportunity for our organization to earn a significant amount of new funds we never thought possible.

The program is very simple and it does not cost either of us a thing. When using a real estate agent, you generally pay a 6% commission. If you select a Solveres Realty Advisor today using the Solveres System, not only will you never pay more than the 6% commission of your broker's then current market rate, but you will also receive a discount from the sale of your home in the future and when you buy your next home!

*The Solveres System saves Realty Advisors time and money by gaining customers today. For the privilege of having you as a customer today for **whenever** you may need them in the future, they have agreed to discount a portion of their commission.*

***For Example:** If you sell a \$500,000 home and then purchase a \$600,000 home, your total discount is almost \$5,000!*

- *Consider donating this discount to our organization. You can pledge your discount to us and it qualifies as a charitable donation.*
- *Solveres will refer you to a Solveres Realty Advisor or you can select one. Once you begin your relationship with your assigned Realty Advisor, they'll provide timely and appropriate communications to you about your neighborhood real estate market.*
- *Whether you're selling your home now, next month, this year or even years from now, your participation in the Solveres Program can help us raise money.*

We have enclosed the following:

- 1. Program Overview*
- 2. Frequently Asked Questions*
- 3. Commitment to the Consumer*
- 4. Solveres R Pledge Agreement*

Please kindly review the documents and return the signed R Pledge to Mrs. Jones at the Development Office. For any questions, contact Amy Hill, our Program Coordinator at 555-222-1234.

Sincerely,

*Ellen Smith
Director of Development*

DONOR EXPANSION

Phase 2 -- Program Adoption and Acceptance Secured

In Phase 2, you are now ready to expand the participation of your membership. The immediate focus is on those supporters considering the sale of their current home and purchase of their next home over the next 12 months. Developing this group quickly into donors willing to give the R Pledge discounts to the nonprofit supplies first year tangible dollars for the nonprofit and further leads to program substantiation.

STEP 11. A total of ten supporters have executed a R Pledge. Launch the "Today" campaign using sample flier requesting imminent sellers to use the Solveres System.

- Send out flier **Thinking About Selling Your Home This Year** targeting near term home sellers/buyers and playing to the fact those selling in the next 12 months are vital to a successful first year campaign
- Testimonials are used for further promotion or are integrated into the flier **Overview of Program** (front and back used for copy)
- Distribute testimonials from supporters espousing merits of program
- Have supporters present Solveres information during other committee meetings

STEP 12. Direct mail campaign to the more committed donors

- **Sample Donor Letter** sent to leading 100 supporters and donors

STEP 13. One week later, each of the 10 supporters now call upon recipients of donor letter, with a goal of securing 4 additional R Pledges per original supporter

STEP 14. Third announcement prepared for communication

- Distributed via bulletin, newsletter, web site, or e-mail
- Promoting to membership, community, & congregation
- **Announcement #3** is suggested as an example to consider

STEP 15. Conduct the 2nd Orientation Session

- Strive to have at least 100 members attend
- Using direct mail, repurpose **Invitation #1**
- Send to the most active members (most money donated, volunteers hours given, passionate about cause, longest time as members)

STEP 16. Program Coordinator follows-up with the Top 100 supporters to personally confirm their attendance

- Confirmation letter sent to Top 100 one week prior to second Orientation Session
- E-mail reminder sent to Top 100 the day before second Orientation Session.

STEP 17. Program Coordinator and Executive Director present program

- Emphasize importance of near term Consumers supporting the program
- Real estate agents that are members should attend as a way to demonstrate their endorsement (and generate R Pledges)
- Solveres attends in support of program
- Sign-up table at back of meeting with informational packages

STEP 18. Personal Visits

- Program Coordinator personal visits the 25 supporters that have indicated interest but are on the fence
- Executive Director calls Top 25 that have yet to join

STEP 19. Launch Awareness Campaign

- Identify 10 volunteers
- Divide membership list by 10
- Each volunteer calls 3 members per day (150 total calls placed per week)
- Adjust call activity level to generate at least 10 R Pledges per week
- Repeat until all members have been called and solicited

STEP 20. Schedule a Breakfast Meeting

- Thank all the supporters that have pledged their discounts to the Nonprofit
- Ask for their continued support in raising program awareness
- Solicit ideas about how to achieve 75% participation

Phase 2 success is realized when 100 supporters have entered into R Pledge Agreements and pledged their discounts to your nonprofit organization

Optimally some of the supporters are Consumers selling or buying their home within the next 12 months. This group becomes your feet on the street, they are the champions actively promoting the program, encouraging participation and identifying the merits for them, the nonprofit and the Realty Advisors.

Next phase in the progression of this program, you will be renewing membership interest and use of the R Pledge again so those who have already sold or bought their home - once more helping you to sustain revenue flow.

Promotional Fliers

Several versions of fliers will be used to promote adoption of the Solveres program. These are designed to capture the attention of the nonprofit's supporter, provide sufficient information to generate their interest and get them to take action. Seasonal fliers that coincide with holidays, recognized events, etc. give you the opportunity to solicit members again, with a fresh look yet similar message.

Many homeowners make the decision to sell their home in the first calendar quarter of the year, so it is appropriate that a strong campaign be launched in the New Year to encourage use of the R Pledge prior to selection of a Realty Advisor and listing or buying of a home. This flier is a call to action, has a defined time element, and should create a sense of urgency with the Donor to use the program.

Fliers should be colorful yet appealing and not overwhelming. Content should be easy to comprehend yet complete enough that the reader understands the program. Simplicity must be communicated throughout the materials so the potential donor views the program as easy to understand, easy to engage in and is all upside for the donor and nonprofit alike.

Fund-raisers can enable supporters to either be proactive and e-mail fliers to friends and prospects or to simply add a link to their e-mails. Get your supporters to help you to solicit contributors to prescribe to the Solveres Program. Fund-raisers can also set up a Favorites Board where only the vendors and products that you approve will be presented, and this is a perfect place to post the current flier.

From a timing perspective, fliers should be prepared and sent out every 6 -8 weeks following commencement of the Launch. The **first** flier should be sent out once the Program Coordinator and at least 3 donors have executed the R Pledge. The **second** flier should be sent out when 10 donors have executed the R Pledge, and should have an emphasis on those supporters considering the sale of their home in the next 12 months. Thereafter, every 6 - 8 weeks is appropriate and keeps the membership informed about the progress of the program, piquing their interest and eventual participation.

Announcements for Newsletters and Bulletins for Phase 2

ANNOUNCEMENT #3 should be more specific and geared towards those Consumers that are considering selling or buying a home in the next 12 months. This announcement is a call to action, perhaps authored by the Program Coordinator or one of the members of the nonprofit that have executed an R Pledge. The intent of this announcement is to validate the program by way of endorsement. Provide several points of contact, including the Program Coordinator and several donors that have already executed an R Pledge.

If you are thinking about selling your home today, next month or this year, you can help our organization raise money through the unique Solveres System. Mrs. Jones our Program Coordinator, a nonprofit member and an extremely loyal, longtime donor, is coordinating the Solveres Program and will be working with our staff and other families who have also been very supportive of our mission and goals. Please take a few minutes to visit.

SUBSEQUENT ANNOUNCEMENTS should be geared towards a continuing endorsement of the program and may include pledges to date and/or number of donors in the program. Sustaining momentum, displaying success and conveying the nonprofit's relentless support of the program will be the theme for each of these announcements.

Success Story

This is a success story about our members willing to pledge their discounts through Solveres to our organization. The theme is that in just 30 days, the Solveres Program is working. We have tried many fundraising programs, with varying degrees of success. When I got involved with the Solveres Program, I just knew that we could easily raise substantial funds from an alternative source.

"Traditional fundraising events like car washes, walkathons,, bake sales, selling products, and buying things via the web with rebates back to the nonprofit are reasonable activities but do not raise much money to speak of, especially when trying to fund a \$8M construction project. Consider a school that had 416 people participate in a walkathon, raised \$2,700, which

is about \$5.50 per person and required many, many volunteer hours to plan, coordinate, schedule and execute. A low return on the volunteer investment for sure.

Since we published our participation in newsletters and through fliers, we have really turned things around. During the past 30 days, our small group has secured 10 donors that have Pledged their discounts, with their total pledges estimated at \$30,000. That equates to nearly \$1,000 per day - no other program has worked so well for us. These monies will help us expand our development efforts. It's a win/win for everyone!"

*Janet Stevens
Program Coordinator*

SUPPORTING INFORMATION

Attaining and Measuring Your Goals

Results measurement is an important component of communicating and maintaining campaign success. We introduce just one example of how to measure your accomplishments and results with Solveres.

Some Nonprofits believe that some of their accomplishments are intangible and therefore not easily measured. Religious congregations and environmental groups in particular hold a general belief that their accomplishments are intangible. Other barriers reported were lack of knowledge on how to measure results, limited capacity to collect data and difficulty in contacting former clients.

This is an easy program to track and information is provided back to the Nonprofit form Solveres. For example, we will tell you:

- Number of R Pledges generated through your efforts
- Number of R Pledges generated through other efforts, naming your Nonprofit as the beneficiary of a pledged discount
- Number of R Pledges that have resulted in actual discount amounts

- Total dollar value, program-to-date, allocated to Nonprofit
- Total dollar value, this month, allocated to Nonprofit
- Number of R Pledges yet to come to fruition

In a monthly newsletter or bulletin, the Nonprofit may want to develop a simple table that demonstrates the progress being made with the Solveres Program.