

Major Donor
Engagement Strategy

Revealed

the**TIMOTHY**group

6

Detailed
Action
Steps To
Engage
Donors

#1 Scheduling

THE DONOR CALL

Scheduling a meeting is often the most difficult part of the stewardship process. It takes discipline to set aside time daily and weekly to be on the phone, or text or both, encouraging partners, scheduling face-to-face visits.

Sample Script

“Hello Bill, this is Fred, just checking in on you and Mary to hear how your summer is going...”

- Start with small talk.
- Ask how God is working in their lives.
- Listen and let your donors share their life with you--it's relationship building and

revitalizing.

The call should
accomplish

5 goals.

1

THANK THEM

for their ongoing investment in your ministry and the eternal impact they are making with the people you serve.

2

UPDATE THEM

on your life, family, church, business, and plans that involve your ministry (prayer journey, a mission trip, special event). Invite them to a special event or gathering.

3

SHARE EXCITEMENT

with a story of how your ministry changed a life or one or two key metrics demonstrating forward momentum.

4

GIVE A GLIMPSE

by sharing your 60-second pitch on how the campaign will make a difference for Christ. Give a 30,000-foot overview of key reasons why it's the right next step for your ministry.

ASK FOR A FACE-TO-FACE MEETING

“

Could we schedule a time to meet?

I would love to share our plans and ask for your
prayer and financial support.

”

(Remember—the goal of the phone call is to schedule the meeting, not ask for a gift.)

#2 *Visiting*

THE DONOR

The kitchen table is where donors make true stewardship decisions. This personal setting creates the best environment for asking. It gives uninterrupted time and donors feel more comfortable to ask questions and share thoughts.

DURING THE VISIT...

- Share details about the campaign, answer their questions, and make a request.
- Encourage them to network with their friends and become "friend raisers".
- Visit your top 50+ donors in person annually.

#3 Answering

DONOR QUESTIONS

Clearly share the vision and answer every question. Here are some scenario questions and answers that may help you during this crucial step.

QUESTION

WHY
NOW?

ANSWER

As we look at our opportunities to serve others, This new facility will help us reach more people more effectively. We are convinced that the hour is late and we sense an urgency from the Lord to accomplish all we can.

QUESTION

WHY SO MUCH
MONEY?

ANSWER

We have carefully reviewed our needs and the space required to meet those needs. Our goal is to solve our current restrictions and allow room for future growth. Our building will be functional, but not extravagant.

QUESTION

ROI & SROI?

ANSWER

Let's start with the spiritual return on investment. *(Add some key metrics for your ministry.)* We are good stewards of the resources God has entrusted to us. Our fundraising expenses are ___% of our budget, which aligns with other ministries of our size.

#4 Making

THE ASK

should be a smooth transition leading up to asking these 4 crucial questions during the kitchen table visit.



Will you continue to pray for the ongoing ministry and for open doors as we share this campaign with our partners?



Who else do you know who might have an interest in this campaign? How could you help us open that door to an individual friend, family member, someone at your church, or a foundation, corporation, or business contact?



Will you consider a gift of \$200,000 per year for the next 5 years over and above your current level of giving, for a total of \$1M? (Determine the ask amount for each visit in advance.)



Have you included our ministry in your estate plan? Would you be interested in a further conversation about that opportunity?



#5 *Following Up*

YOUR DONOR VISIT

This is a key step in the stewardship process. Be prepared for more questions and consider these responses.

QUESTION

WOW, THAT IS MORE
THAN WE WERE
THINKING
OF GIVING.

ANSWER

We understand.

This is the largest step of faith in the history of our organization. We are asking our ministry partners to prayerfully consider making the largest, most generous, and sacrificial gift they have ever made.

QUESTION

WE NEED SOME TIME
TO THINK
AND PRAY
ABOUT OUR
DECISION.

ANSWER

We are delighted that you think enough of this opportunity to take this before the Lord in prayer. Will a week or two be enough time for you to pray and decide? May I call you in a couple of weeks to answer any questions and hear what God prompts you to give?

QUESTION

HOW COULD YOU
HELP ME WITH MY
PLANNED
GIVING/ESTATE
PLANNING?

ANSWER

We have trained specialists who are experts in all areas of planned and deferred giving. They can help you by reviewing your existing plan or help you create a plan that will reflect your heart to impact the kingdom for God's glory. We can schedule a phone consultation with one of our experts.

QUESTION

WILL YOU BE SENDING
US A PLEDGE CARD,
COMMITMENT
DEVICE OR A LETTER
OF INTENT?

ANSWER

Yes, once you have made your decision, we will send you a letter of intent. It will detail our understanding of your commitment and when you plan to fulfill your pledge. This helps us plan as we move forward with our project. We can complete much of the information over the phone.

QUESTION

IF WE REFER OUR FRIENDS
AND INTRODUCE
THEM TO YOU, HOW WILL
YOU
TREAT THEM?

ANSWER

We practice the “Golden Rule” and treat your friends how you would treat them. We believe giving is based on relationships and that building trust is key to long-term partnerships.

- Perhaps you could invite your friend and me to where I can listen to his or her giving interests.
- A home gathering is another way to introduce our ministry to your friends.

FOLLOW-UP WITH A HAND-WRITTEN NOTE

SAMPLE

Thank you for the wonderful visit in your beautiful home to catch up on our lives and share our exciting campaign. We trust you will give prayerful and careful consideration of our invitation to be a leader in this campaign with a 5-year commitment of \$1 million dollars. I will call you in a couple of weeks. Thanks again. Your friendship and partnership mean so much to us.

#6 *Nurturing*

YOUR DONOR RELATIONSHIP

Take a personal interest in your donors and connect as often as you can.

ADDITIONAL TOUCHES



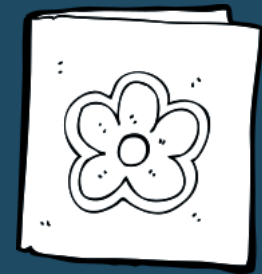
Personal visit
to catch up and
share life.



Phone or virtual
call to give a
campaign
update or share a
story.



Text or email to
ask for or offer
prayer. Share an
article, website or
resource link.



Hand-written
note or special
occasion card to
congratulate or
celebrate.