



STEWARDSHIP, STABILITY, & SUSTAINABILITY

PRE-ASK MEETING AND SCHEDULING A GIFT REQUEST

March 17, 2021



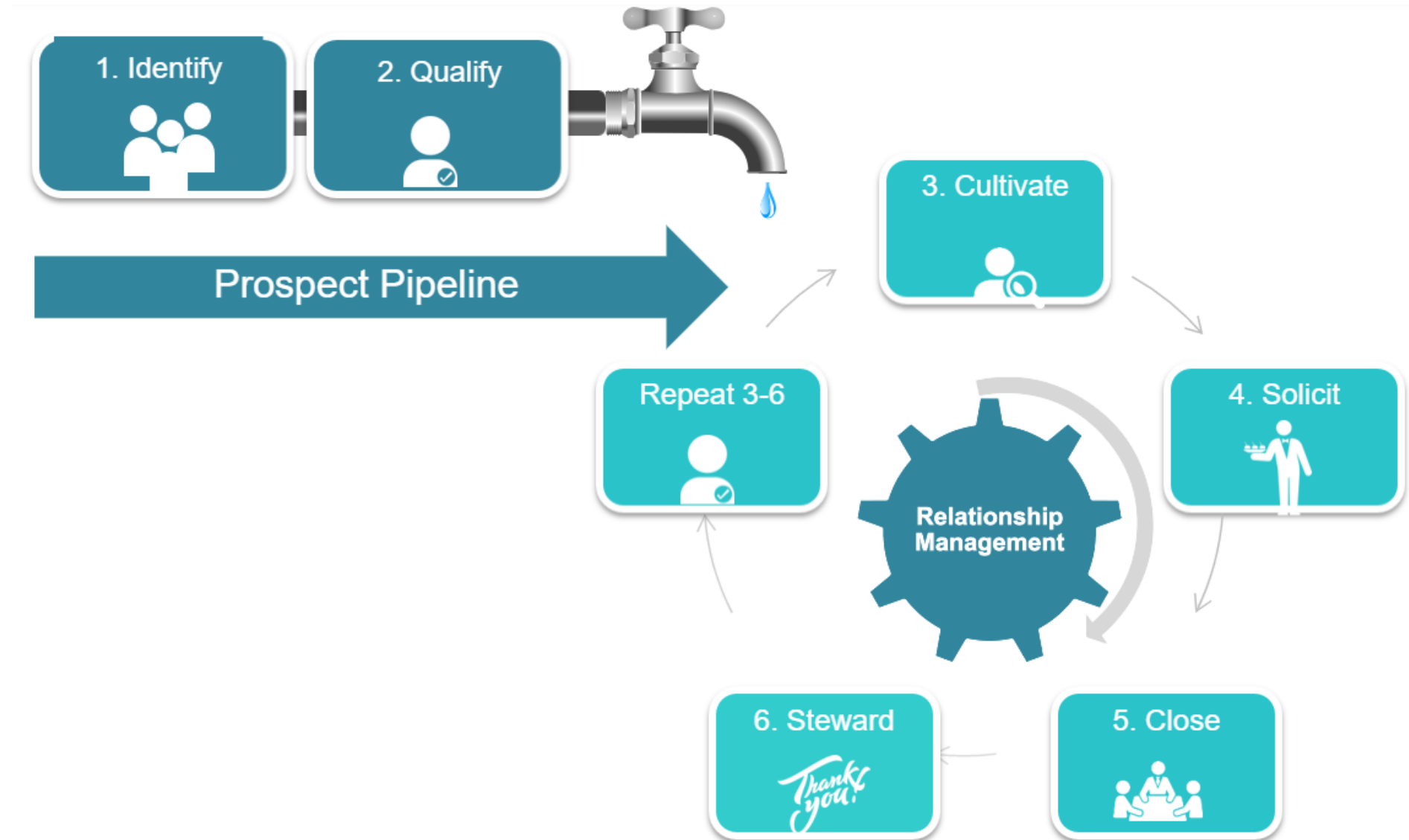
Agenda

Opening Prayer

1. Pathway to Securing Major Gifts
2. The Basics
3. Cultivation – Listening and Learning
4. The Pre-Ask Meeting
5. Scheduling the Ask
6. Discussion

Closing Prayer

PATHWAY TO SECURING MAJOR GIFTS



THE BASICS

People give to people

People give because they are asked

People give to a winning cause

The best solicitors are donors themselves

Donors respond to specific requests for support

Giving is contagious

All donors deserve recognition for their gifts

Personal visits result in larger gifts

CULTIVATION – LISTENING & LEARNING

Philanthropic motivations and priorities

Reactions to the Church's plans and the Case for Support

Barriers to an ask (obstacles to deepening involvement)

Current perceptions

Best person(s) to ask for a gift

Potential areas of giving

Ways to interact with their life

Their readiness to make a major / planned gift

OBJECTIVES OF THE PRE-ASK MEETING

Thank the potential donor

Share the vision for the project / Church

Listen for cues about personal interest

Establish timeframe to present a proposal / make the ask

Determine immediate next steps

TIPS FOR GUIDING A CONVERSATION

- Introduce yourself
- Be friendly and engaging
- Make it easy for the person to talk
- Tell your story about the congregation
 - Share your personal experiences and enthusiasm
- Ask open-ended questions and based on your goals for the conversation

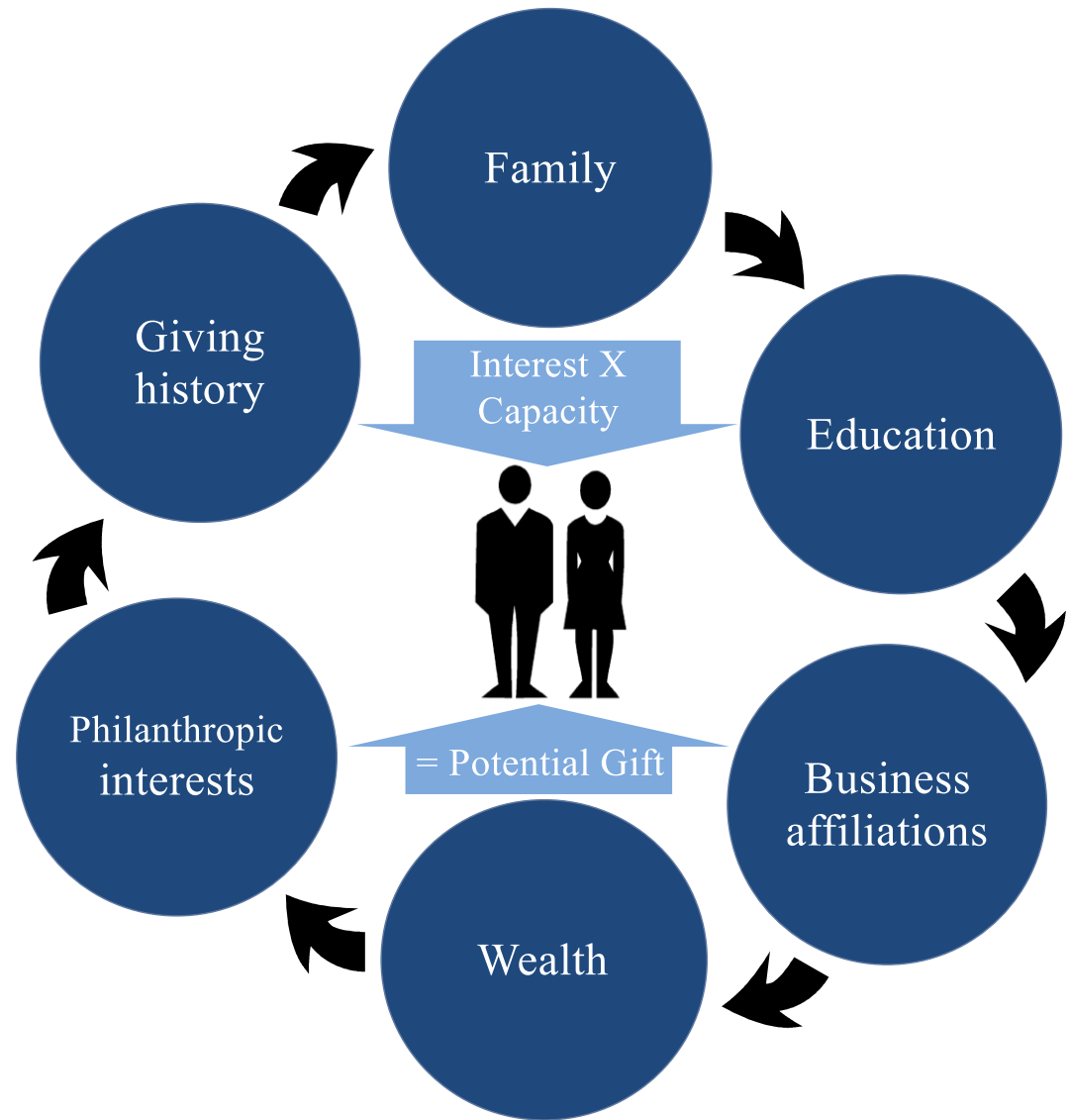


TIPS!

- Listen to the answers and glean information
- Initiate the next step
 - Offer your email address, phone number
 - Set up the next conversation
 - Offer reasons to meet again
 - Don't put him/her on the spot

THOUGHTFUL DIALOGUE

- ✓ Permission
- ✓ Fact-finding
- ✓ Feeling-finding
- ✓ Tell me your story...
- ✓ Paint me a picture...
- ✓ Tell me more...
- ✓ Importance / satisfaction



PERMISSION QUESTIONS

- Would it be all right if I asked you a few questions?
- To make sure we talk about the best stewardship opportunities for you, may I ask some additional questions?
- To be sure I am clear....

**Demonstrate
empathy,
exhibit respect,
and build trust**

FACT-FINDING QUESTIONS

- Do you support other charitable causes?
- What kind of charities do you support?
- When did you last visit or speak with us?

**Clarify who, what,
where, when, why,
and how much**

FEELING-FINDING QUESTIONS

- How do you feel about your overall charitable giving?
- What do you think about our congregation?
- How would you prioritize our Church's vision for the future?

**Reveal
parishioner's
opinions, feelings,
values and beliefs**

ILLUSTRATIVE QUESTIONS

- Tell me your story
- What has your family's experience with the church been like?
- How has your religious experience affected your life?
- Paint me a picture of what you would like to see happening at the Church five years from now?
- Paint me a picture of what you see as important

**Establish
opportunities for
support, isolate
area of interest**

IMPORTANCE AND SATISFACTION QUESTIONS

- What is important to you about the Church? Why?
- If you were to give in a sacrificial way, what would you like to achieve with your gift? Why?
- If you were to support the Church, would it be personally satisfying? In what way?

**Determine level
of affinity**

“TELL ME MORE” QUESTIONS

- Can you tell me more?
- Can you be more specific?
- Can you elaborate on that?
- Is there anything else that would be helpful to know about your current situation?

**Really understand
what they are
saying**

INVITES FOR MORE INFORMATION

- Can we schedule another time in the coming month to meet with one of our clergy / vestry members?
- Next time, perhaps we can talk more about how you can specifically make an impact on the upcoming project / create a legacy for your family. Would that be okay with you?

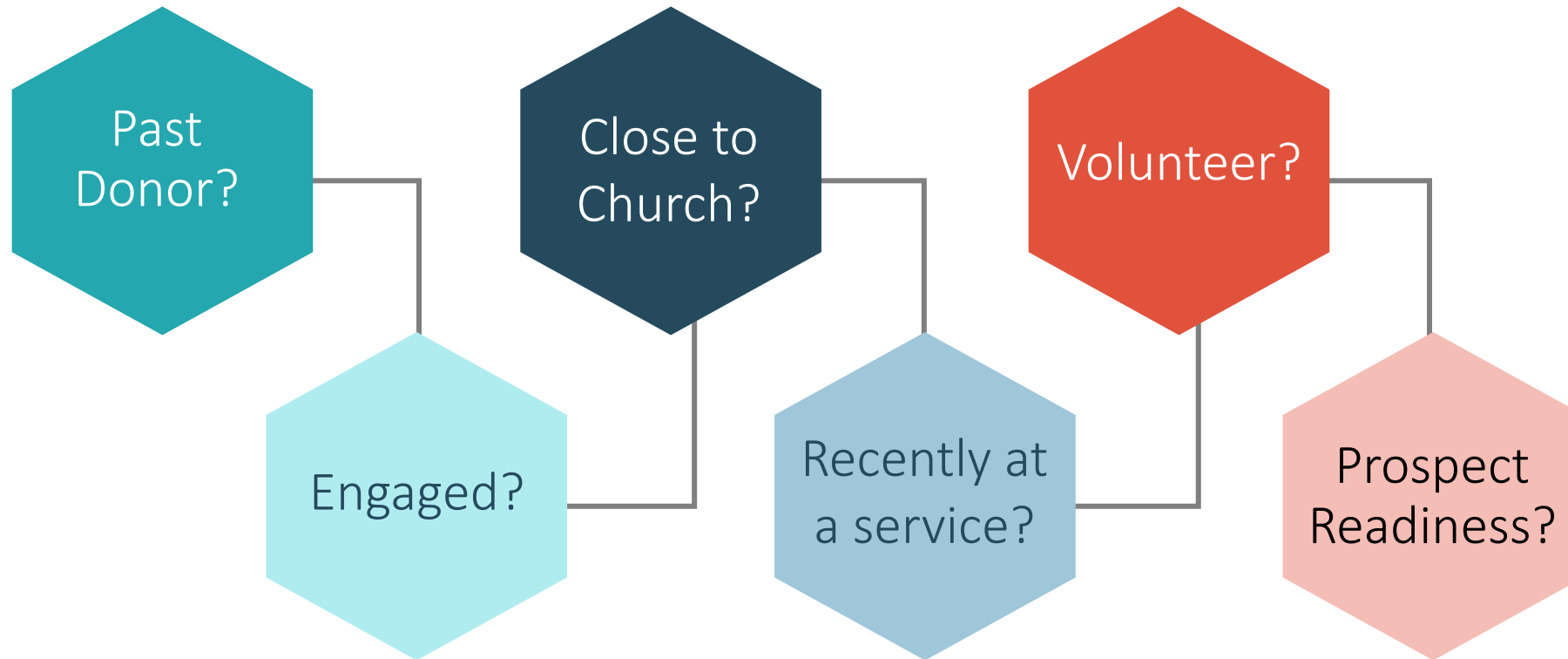
**Confirm
next steps**

REQUESTING THE MEETING



KNOW BEFORE YOU CALL

Who is the audience?



KNOW BEFORE YOU CALL

What is your intended outcome? Scheduling a meeting!

- ✓ Be enthusiastic and personal
- ✓ Have your meeting request sentence ready
- ✓ Be prepared with possible dates and times
- ✓ Have a Plan B
- ✓ Prepare for questions
- ✓ Anticipate potential roadblocks
- ✓ Be brief – don't go into detail on the phone

SCHEDULING THE VISIT

Scheduling the visit can be done via a phone call or email, depending on the prospect's and/or your preference.

Key Points

- Emphasize that you are calling on behalf of the clergy and the Church
- Always include the spouse and schedule a visit that will be convenient for everyone attending
- Avoid scheduling the visit to take place in a crowded or public place
- Provide just a snapshot of the purpose of the meeting, don't delve into details
- Suggest a specific meeting time and place, ideally at the parishioner's house or on Zoom
- Remember that on the phone, your only task is to schedule the meeting!



Hi ____! This is _____. I am a fellow parishioner/ clergy member at _____. I am calling on behalf of (clergy) regarding the campaign we are conducting / new legacy society in our parish. (Clergy name) asked me to personally follow up and contact you to discuss our vision in greater detail. I am hoping to set up a time when we might meet in person over the next few weeks to share the details with you, get your opinions on things, answer any questions you might have, and talk about the possibility of your support. Can we get together for about 30 minutes sometime this week, perhaps Tuesday at 7:00 PM?

SCHEDULING THE VISIT – COMMON RESPONSES

“Can you just tell me about this now on the phone?”

“I already know about what you’re raising funds for, I don’t need to meet”

“I’ve already made my annual gift, why do we need to meet?”

“I’ll just find you at services next weekend”

“Can you just send me some information in the mail?”

“No need to meet, I’ll be happy to put a gift in the mail”



DISCUSSION

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