

Anatomy of a Financial Invitation

INSTRUCTIONS: Using this outline, customize an ask that fits your own nonprofit and style. It is not presented as a formula/script, but rather a general guideline. These are not necessarily the words you NEED to say, they are guidelines to help you practice so you can effectively HEAR the champion and make an invitation that reflects their heart and connection to the cause.

STEP 1 — CHECK IN, CELEBRATE, CARE

- Confirm the outcomes and time frame established when scheduling the meeting
- Check in about personal connections—family, hobbies, work
- Ask about what God is doing/speaking to them
- Help them feel seen, heard, valued

STEP 2 — TRANSITION

- Remind that part of the purpose of the meeting is to discuss next steps you believe would be good for them.
- Discuss items from previous conversations.
- Celebrate the impacts of previous gifts or involvement.

STEP 3 — DISCUSS CURRENT OPPORTUNITIES

- Discuss the strategic priority for which you are inviting a gift and why you believe this aligns with their heart.

You can say things like:

- *You have played a key role in this solution by (list other ways they've engaged)*
- *You have supported this cause for many years in (prior ways they've given) I know*
- *you care deeply about this cause as evidenced by (things they have said)*
- Share why you believe this invitation ties to the overall mission, vision and impact of the organization.
- Ask them if they have any questions.

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STEP 4 — MAKE THE ASK

- Share the overall financial need and the specific part you are asking of them.

You could say something like: *Thank you for letting me share about what can be impacted together. I want to invite you to prayerfully consider this (specific) financial gift.*

It could also be helpful to use the XYZ formula: *Would you give a gift of \$X which would provide Y which means Z happens?*

STEP 5 — RECEIVE THE RESPONSE

You may need to be quiet after you share the invitation and allow them time and space to think and hear from the Lord.

In all responses, appreciate with thanksgiving their willingness to hear your vision and respond.

Yes:

- Work out the details of how they'd like to make their gift.
- Ask what appropriate follow-up would look like.
- Invite another next step (seeing project in action, reading a specific book, etc.)

Probably/Maybe:

- Share how you appreciate their thoughtful and prayerful consideration.
- Ask if more time or information would help them discern if this is right for them. (if more information is needed, provide a timeframe in which you will provide it.)
- If at all possible, establish a specific time for following up.

Silence:

Silence is often a time when God is speaking and we need to allow time and space for processing.

You could say something like: *I sense from your silence that you might be needing some time to process. Can you talk about what God might be speaking to you right now?*

- Share how you appreciate their thoughtful and prayerful consideration.
- Ask if there is anything you can do to help them in their processing. (if something is needed, provide a timeframe in which you will provide it.)
- If at all possible, establish a specific time for following up.

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No: • Discern what type of no you received.

- *No to the timing?*
- *No to the project?*
- *No to the amount?*

A no does not have to be the end of the relationship. A no can clarify their interest and connection points. Often a no is a springboard to further discovery, and ultimately a financial invitation even more suited to the champion.

If it is a firm no, it still does not have to mean the end of a relationship. Invite a different next step (how can they pray, serve, share or learn more about this particular need?)

- Invite them to consider sharing this with others who might be able to provide the solution.