

EFFECTIVE

DONOR ENGAGEMENT

FOR CHURCHES

PASTOR Edition

In this article, we'll be giving pastors practical tools for improving the donor experience. We'll unpack The Four-Part Cycle of Donor Engagement - a process that in my view is a best practice approach to building and stewarding donor relationships. We'll take each part of the cycle and share specifically how it works in the context of a church.

Pastors, we'll also guide you in how to best leverage your staff and your volunteer leadership in each of the phases of the donor engagement cycle.

I have come to believe strongly in a four-part cycle for donors: (1) acknowledgment, (2) trust-building, (3) presenting the case for support, and (4) the ask. The cycle is important as it keeps the donor's needs, interests, and values in view at all times.

ACKNOWLEDGMENT

The foundation of my relationship with a donor, like the foundation of my relationship with any friend, is what we call “acknowledgment.”

In your interactions with this person, you acknowledge his or her value as a human being by giving attention to life details, activities, opinions and values. You also acknowledge a donor’s generosity and *affirm* the role he or she has already played in the ministry of the church. Gratitude and appreciation are core to the relationship. When you send a message of genuine thanks for the donor’s time, you build credibility.

Pastors, how do we apply this concept inside the church with our givers?

- 1 Team thanking.** First, consider your staff - all your staff - as a team in this approach to your donors. Whether you’re a large, multicampus church or a staff of two or three part-time employees, have the conversation about donor gratitude and how everyone can be involved in thanking your givers. Set a goal of making sure your consistent, recurring donors hear from you with an occasional handwritten thank you card, a phone message or a personal email. While the thanks of the pastor is critical, your staff reaching out at times throughout the year to thank tithers and consistent donors sends an important message of their value.

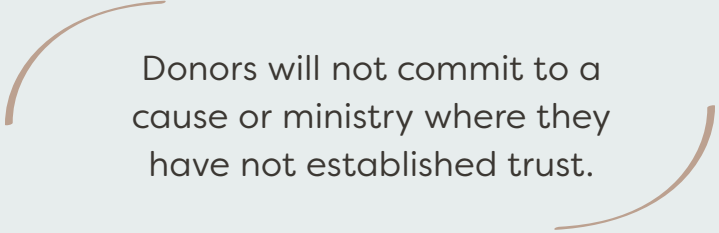
2 Team thinking. No matter the size of your church, involving key volunteers in thanking donors can also have a significant impact. The adult volunteers who chaperoned the youth mission trip could divide up notes and photos to those who contributed to make it happen. Your worship or board volunteers could tag team occasional notes to your significant contributors just to tell them how their support impacts the ongoing work of the church's ministries.

3 Strive for tangible, specific examples of impact. Use your broad "team" of staff and key volunteers to generate a list of all the specific and tangible things your givers make possible with their tithes and offerings. How are your donors advancing the Kingdom work on a day-by-day basis in your congregation? Refresh this list at least a couple times a year and keep it in the forefront for your acknowledgments and donor communications. This is one area where the church could most learn from nonprofit organizations, who often share with donors EXACTLY what gifts at certain levels help accomplish. Use your budget and your ministry outcomes to be as specific as you can with givers about their impact.

Acknowledgement is the crucial foundation on which an authentic donor relationship and any eventual larger request for funds must be built. One might say I must "earn the right" to present the case for support for future projects. If I have acknowledged the donor and his or her impact adequately, I can eventually present a case for greater support with confidence that I won't be violating the values of the donor, or unintentionally devaluing the donor.

TRUST-BUILDING

Trust-building means something a little different for church givers than for donors to a cause or nonprofit charity, where they are typically less directly connected. For pastors, this trust-building phase IS the relational phase of ministry. This is where we intentionally discover a donor's passion and where it connects to our church's work.



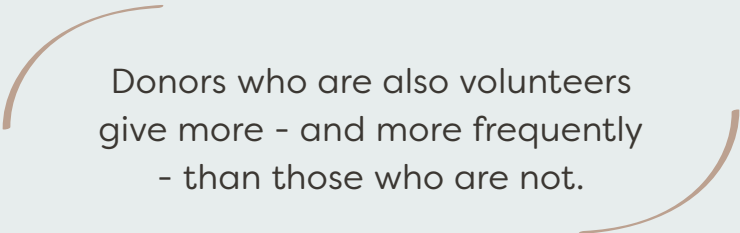
Donors will not commit to a cause or ministry where they have not established trust.

The importance of this phase of donor relationships cannot be overstated. No less than 80 percent of the time we spend with a donor will involve the trust-establishment process. If there is a single core to ministry-based fundraising, this is it. You don't hound, pressure, manipulate, or 'emotionally inspire' a contribution from someone; you build trust so that a contribution becomes the natural outflow of the relationship.

The church has a massive advantage here. We're blessed with established connections in and community among members, who each have reasons for being involved. But too often I see the church taking these for granted in not asking members why they attend, what keeps them in the congregation and what inspires their giving.

Pastors, this is where your staff and key volunteers can be incredibly helpful in stewarding relationships with both long-time and new members, getting to know them and asking those questions. While this can be accomplished through intentional conversations, one-on-one meetings and just natural relationship building, it can also be helpful to consider occasional surveys to members or subsets of your donors. The act of asking for feedback is in itself a trust-building effort. Short, targeted feedback surveys that combine both quantitative (such as Likert scale) questions with a few open ended ones can provide tremendous insight to member attitudes or how your various communications or programs are perceived. This also can give your loyal members a sense of agency and ownership in the ministries they're supporting with their gifts.

Getting your members involved and working on the front lines in your ministry is another foundational trust-building strategy.



Donors who are also volunteers
give more - and more frequently
- than those who are not.

This is another area where the church has an edge over other charitable organizations in terms of the kind of experience we should be able to provide givers. Leverage your staff and your key volunteers in really being intentional about honoring your loyal volunteers, spotlighting them, helping share their story and inspiring others with it. Consider how your volunteers can help you communicate your ministry's impact and outcomes more effectively.

PRESENTING A CASE FOR SUPPORT

The third phase of the Four-Part Cycle is presenting your case for support. In the church, the case for support most often looks like one of three things: a capital campaign, an immediate need fundraiser, or the annual stewardship campaign. No matter where you find yourself as a church in this season, the practical tools in this blog will help you prepare to make the best possible case to your donors.

In the philanthropic development world, when we present a case for support to a major donor, it always has four essential components. There is a problem, a solution, a strategy and an invitation to partnership to solve the problem.

While those four components are most translatable to a campaign or immediate need effort, we should be able to articulate it even for our annual stewardship campaigns. What problem is the tither solving with their tithe? Instead of the appeal you typically generate during your stewardship campaign, consider reframing your approach to see the giver as the partner or hero in your church's story. Tell the story from that perspective.

Here's an example:

Each Wednesday, 30 high schoolers and 20 middle schoolers experience a time of fun, service and spiritual formation together. Their parents have a time of fellowship, Bible study and connection. These 50+ families are nourished and energized to be Christ's hands and feet each week during their Wednesday night gathering. Your gift makes it possible for us to underwrite the \$750 weekly cost of food, supplies, facilities and staff time. Without you, we would not be able to offer this important time for our families, which over the last months has also attracted new prospective members. Thank you for partnering with us in this important ministry.




That Wednesday night session might be something you've offered for some time - it's on autopilot and it's not a new program looking for funding. But in truth, it has a hard cost and your loyal donors are funding it. It has a value for your members and your outreach. Seek to frame the impact of your ministry - especially those parts people might take for "granted" - in a way that shows the donor as the central protagonist of your church's story.

The more you as pastor - and your staff - can be specific about that donor impact, the better prepared you will be to launch an annual pledge drive or a campaign for a project. Be transparent and work hard to name those tangibles that donors can underwrite with their generosity.

Pastors:

A word about donor nuances, especially in the case for a capital project or campaign. For your most major donors, your acknowledgment and trust-building phases will have given you a strong sense of their readiness or interest in the campaign. How you approach them about this - especially lead gifts - must grow out of your understanding of the individual donor's learning style.



It helps to have a range of materials and types of presentations at your disposal so that you can communicate effectively regardless of an individual donor's specific 'wiring.' How does this individual instinctively prefer to receive information? Be flexible so you can communicate on the donor's unique wavelength. Present the case for support in a style that enables the specific donor, with his learning style, to say, 'I get that!' Some donors prefer to receive lots of information in advance of a meeting. Some prefer to have a casual conversation over lunch. Some prefer to be buried in audit numbers and information. The message must come through in a medium that makes sense to the donor.

All of this prep work keeps the donor's style, interests and passion at the center. When we're building authentic and trust-filled relationships, we can't take shortcuts, rush the process or manipulate donors, even when we feel pressure to hit our budget or campaign goals.

MAKING THE ASK

In this cycle, the donor is always at the center, which helps us ensure an effective and fulfilling donor experience. When preparing our case for support, we've outlined how that appeal should always include four essential components: a problem, a solution, a strategy and an invitation to partnership to solve the problem. This is true whether our ask is a personal one of a major donor or a broad appeal during our stewardship drive.

In a broad appeal, the invitation to be a partner in the solution needs to be very clear. It should show the giver how he or she can play a role in solving the problem you've presented and how they can be a partner in your church's mission and ministry. Be as specific as you can. Again, this is where churches can learn from charitable causes who give donors "dollar handles" - or specific gift amounts that speak to what giving at that level helps accomplish. These help givers visualize the kind of impact they have with a pledge or commitment.

It could be as simple as statements like:

"It takes 10 members giving \$1500 annually to support the salary of our part-time youth pastor. It takes 20 members giving \$100 a month to fund the costs of our worship music, instruments and sound system."

Pastors, when making a personal ask of a donor or asking for a lead gift, here are some tips for that conversation. After you have acknowledged and affirmed your donor, built trust, and presented your case for support, it is time for the ask!

Here is an example of language to use when it seems like the right time to transition from presentation to ask:

‘Susan, based on the information I’ve shared with you here, do you have any concerns about this project? Any questions I could answer? No? Would this be a good time to share with you what we’re going to need financially? This is a \$55,000 project. We’re looking for three donors of \$10,000 or more. Would you be willing to take one of those positions, to be one of those partners?’

If you’re unsure about the specific dollar amount that a donor might give – let the donor see the total need, and let the donor set the bar:

‘Here’s the project, here’s what we’re trying to do. It’s going to cost \$250,000. We’ll need a donor to give \$50,000, and four donors to give \$25,000. We’ll then ten donors to give \$10,000 each. I’m excited you have a vision for this. Where would you see yourself in this project? Do you see yourself as the top donor? Or somewhere else on the chart?’

The donor will probably set his or her own bar by mentioning an amount.

Consider these phrases, statements, and questions as part of your personal lexicon of donor relationships when dealing one-on-one with a potential major donor:

If you're unsure about the donor's possible receptivity:

'Does anybody in your circle of influence at church come to mind who might be interested in a project like this?' (If the donor is 'with' you and willing to recommend other members, he is probably ready to donate himself. If not, maybe you need to go back to trust building, or the presentation of the case. The answer to this question defines *where the donor is on his or her personal journey.*)

Always keep in mind the long-term goal of authentic, trust-fulled relationships with your givers. Some will be passionate about a project and others will not. Let the donor - and God - lead you to where donor passions intersect with ministry needs.

I encourage pastors and their staffs to read and then revisit often theologian Henri Nouwen's masterful work, *The Spirituality of Fundraising*. It's a short read and beautifully written reminder of the Biblical calling that fundraising is ministry - one that brings those who have funds and those who need them into sacred communion.

TIMOTHY L. SMITH

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