



Inviting others to join your Story

1. Role Play Activity with Fundraising

Context: Sharing your Story with a Potential Donor. This person is there to learn why they should give. You are there to invite him/her into your story.

Step #1- Pre-Work: Make sure you have a strategy approach when it comes to the following (feel free to jot notes, if needed) (5 minutes):

Who? *You/the organization?*

What *problem you are solving; need you are filling?*

Why *does it matter (to the person in front of you; why does it matter)?*

How *can the bearer join the Story?*



Which question will be the focus and why; develop your strategy now!

Step #2 Role Play (5 minutes).

Step #3 Role Play self-evaluation (3 minutes)

1. *If you were not comfortable/natural, when was this and reflect upon why?*

2. *Where in the conversation did you invite them into your story? Was it implicit or explicit?*

3. *Did you limit their role in the Story or guide it without their prompting? How did you do this?*



4. *Did you stick to your strategic plan or adjust? Was it successful? How do you know?*

Step #4- Provide Feedback for Role Play (be prepared to share candidly and caringly)

How did the story resonate with you? What adjectives described the interaction?

Did the leader ever seem uncomfortable? When in the conversation? What were the signs?

What else would the potential donor have liked/needed to know before making a decision? Where was there a lack of clarity?

When was the potential donor invited into the story? What role will the individual play in the story, or for what purpose?

2. Mini-Grant Writing Activity

Directions- You need to have on hand the essentials to every grant you will write. This is the Foundation. **We call it the 5-sentence grant STORY!** Answer the following questions as if you were telling a story in writing. Consider the audience and how to invite them to be part of the story!

1. *The problem we address OR the need we fill is...*

2. *Our mission is to (include the WHY? We will get to the HOW? and WHAT? below)...*

3. *Our program helps by...(HOW?)*

4. *The impact so far is...(WHAT?)*

5. *With your partnership, we could (the impact will be)...*



Now write it all together?

Consider the following questions-

- *How does it sit/feel in written form? Remember, you cannot tell the story in person.*
- *What is missing?*
- *What needs to be changed?*
- *Now, make it better for next time!*



3. Donor Touchpoint Plan (12-month)

There is a difference between fundraising and donor development. *Fundraising* often has a start and end. It is a word that can encompass many applications. *Donor development* never ends. Donors stay connected because you are investing in the relationship regardless of the kind of giver, frequency of giving, etc. You are building your community!

Directions- For the following kinds of donors, list 4-5 strategic touchpoints and note the strategy behind it.

First-time Donor (list 4-5 only)

Month	Kind of Touchpoint (be specific; make sure the touchpoint is clear personal, and relational)	What is the strategy behind this?

Some strategy questions to ponder- What other roles can this person play in your story? How do you explore if this person can become a monthly donor or major donor? How can you ensure they become a repeated donor?

Existing and Repeated Donor (list 4-5 only)

Month	Kind of Touchpoint (be specific; make sure the touchpoint is clear personal, and relational)	What is the strategy behind this?

Some strategy questions to ponder- What other roles can this person play in your story? Do you know why they continue to give? Do they need the touchpoints to be reminded to give? Is this person just a donor or an advocate? How can you explore this person becoming a major donor and an advocate?

Major Gift Donor (list 4-5 only)

Month	Kind of Touchpoint (be specific; make sure the touchpoint is clear personal, and relational)	What is the strategy behind this?

Some strategy questions to ponder- What other roles can this person play in your story? Can they give even more than they do? Is this person just a donor or an advocate? How can you explore this person becoming an advocate to set up opportunities to meet with other potential donors.

Directions- As quickly as possible name the first 10 networks that come to mind. THEN list their strengths.

[illegible]

Who is missing? List the first three-five persons/organizations that are not in your network. Why are they important to add? Then go back and note how you will specifically connect with that person/organization in the next 30 days.

I need someone who can.... or someone with...	Why is this person so important to add?	30-day strategy to connect them to your network.



Overcoming Objections

1. How was this experience different than the first time you told your story to a potential donor/ from what you observed in another leader?
2. What is one point of feedback that was most helpful?
3. What is one thing you observed in another leader (tone, attitude, personality, specific wording) that you can steal and implement?
4. What is one thing you will do differently now with every story-telling experience you will have with a potential donor?

Goals and Guidelines for Seminar Discussions

The best learning comes through discussion and conversation because it requires active engagement of the mind. In a presentation our minds are passive, taking in far less than what is intended. Even if the speaker engages an audience member here and there as Socrates did in his dialogues, the audience is still left in a place where the mind can wander rather than wonder.

In a seminar discussion, one central question (with natural follow up questions) guides the entire discussion. There is no presenter or interlocutor; there is only a facilitator who ensures the essence and fullness of the question is considered by all. Participation is expected, ranging between sharing ideas, listening, asking one another questions, etc. It is important to note that silence in discussion is natural and beneficial; it means we are reflecting as we should.

The best discussions are based on **participation that is:**

1. **Respectful and charitable in speech and action.** Seek to promote a spirit of goodwill, grace, and friendship. We are seeking to live out “ironing sharpening iron”, which is outward facing rather than focusing on oneself. Seek the benefit of others, and you too will be filled.
2. **Humble, receptive, and filled with wonder.** Approach each discussion with a hopeful faith that the topic is worth consideration, even if it is an area of strength for you or not a current pain point for your ministry. Avoid being cynical, dismissive, or arrogant when discussing and sharing. The goal is not to show forth what you know but to genuinely converse for the good of all. We want the experience to be encouraging and uplifting; remember, “it is better to give than to receive”.
3. **Prepared.** In order for meaningful and lively discussions to take place, each of us should read prior to the discussion, come with questions of our own, and be able to apply the reading/question to our situation/life experience. Finally, we should welcome insight and questions from others regarding our situation and life experiences.
4. **Frequent and thoughtful** by making relevant assertions and asking thought-provoking questions.
5. **Courageous and vulnerable.** Share from the heart even if you are unsure of yourself, if your statement is imperfectly worded, or if you do not yet have a fully formed conclusion. By its nature, a discussion is incomplete, exploratory, and provisional—it is a communal striving towards truth...together. It is important, then, that each of us make a sincere effort to contribute to the conversation.