

SESSION 2:
GROW SIGNIFICANT
GIVING STEP BY STEP





PLANNING

STEP 1

STEP 2

STEP 3

STEP 4

You can only raise money for two things...

What “business” are you in?

Mission is **how** we do,
what we do,
and **who** we serve.

Vision is **why** we do what we do.
Vision is for a **life** that is
saved or changed.



The Class of 2035



Well-educated - completed a quality academic program

Wise - knows how to use the knowledge acquired

Biblical Worldview - possesses a thinking that is informed by Scripture

Effective Leader - has a positive influence on others

Strong Communicator - articulates thoughts and ideas clearly

Highly Connected to God - strong in faith and spiritual disciplines

Cross-cultural - interacts well with different kinds of people

Engages the World - committed to serving others

Faithful in Difficulty - endures all things with resilience



YOUR MESSAGE

SAVING OR CHANGING LIVES

YOUR VISION AND VISION PROFILE

KEY QUESTIONS

GIVING DRIVEN STEPS

STEP 1
COMPLETE

STEP 2

STEP 3

STEP 4

What are our vision, mission, and values?

How did we get here?

What are we working toward / what is our strategy?

What are the giving driven steps?



PROSPECT PLANNING

FIRST WHO, THEN HOW

A prospect plan is simply a *list*.



MOMENTUM METHOD PROSPECT PLANNING



GREEN



ORANGE



RED

ADVANCED PROSPECT PLANNING

DONORS TO RETAIN

- ☒ List highest to lowest in total giving for the year
- ☒ Establish a target amount, range, or commitment level for each and every one
- ☒ Calculate the possible low and high totals

DONORS TO REGAIN

- ☒ List from highest to lowest in total giving
- ☒ Go back 5-7 years
- ☒ Calculate the total potential giving of donors to retain group

DONORS TO RECRUIT

- ☒ People new to your audience/community
- ☒ People who attend experiences
- ☒ People who have been referred to you
- ☒ People selected from your non-donor list

NON-DONORS

- ☒ Identify who to release
- ☒ Identify who to recruit, and add to your donors to recruit list
- ☒ Look for ways to stop training people to *not* give
- ☒ Provide quality communication and experiences that add value

PROSPECT PLANNING PRACTICE