Pastoral Leadership Workshop

Hosted by NUMF in partnership with St. Luke UMC & First United Methodist Church
Presented by Brandon Sak, Hallett Philanthropy
Location: Omaha First UMC, 7020 Cass St., Omaha, NE 68132

DATE	SESSION TOPIC
Jan. 15 3:00 pm - 4:30 pm	**Identifying and Qualifying Donor Personas** ➢ *Understand the donors in your database from an engagement and giving perspective* ➢ *What motivates them to give?* ➢ *Craft the right fundraising policies and plans for the church* ➢ *Identify and evaluate potential donors* ➢ *Develop cultivation and solicitation strategies that garner gifts* ➢ *Foster stewardship plans to retain and nurture donor engagement*
Jan. 29 3:00 pm - 4:30 pm	**Cultivating and Controlling a Donor Relationship** ➢ *Moves management - How do you move a prospect toward an "ask"?* ➢ *How many meetings? Who else is involved? What does it sound like?* ➢ *What is their philanthropic passion? What moves them emotionally about the church?* ➢ *Develop an understanding of how to control the process and get prospects to a formal solicitation* ➢ *Discuss processes and methods, efficiencies, controlling the process, and when to "bless and release prospects"*
Feb. 12 3:00 pm - 4:30 pm	**Asking… and Closing** ➢ *Major giving/gift solicitation training* ➢ *Understand the importance of setting up & executing a great solicitation* ➢ *Who should be involved, timing, and methods* ➢ *The psychology behind the ask* ➢ *A study of the best philanthropic techniques about getting donors to say "yes"*
Feb. 26 3:00 pm - 4:30 pm	**Stewardship – Big & Small** ➢ *What to do after a gift is made/received beyond the obligatory thank you and tax letter* ➢ *Understanding the cycle of stewardship and the difference in a second or third gift* ➢ *A systematic approach as well as an individual's efforts to steward investment in the mission and recurring gifts* ➢ *Applying learnings to current stewardship protocol*