



STEWARDSHIP CALL SCRIPT for Board Members®

A Resource of The Osborne Group, Inc.

Thank you for making these important calls. Research and experience supports that when you make personal calls to thank donors and share the impact of their giving, they give again, they give more, they tell others and they feel good. Your participation is powerful.

Please consider these scripts as “outlines” for your calls. While it is important to make the key points and ask the questions within the script, ***it is just as important to not sound like you are reading from a script.*** I’m sure you’ve received calls like that from others. They sound canned and phony. This is an important conversation. Please take a few minutes to get comfortable with the messages.

Confidence and friendliness are easily conveyed over the phone. Feel confident that the donors are glad to hear from you and appreciate you taking time out of your busy schedule to call them. Reach out and put that positive attitude in your voice.

Thanks again for helping us and enjoy your calls!

For Donors You Reach:

For calls made immediately after a gift is made

“Hello, I’m calling to let you know that your check for (amount) arrived safely, to thank you for investing in (organization’s name). I also wanted to report to you on how we use gifts like yours. My name is (your name) and I’m a member of the board ... Is this a convenient time?”

“Gifts like yours help us... May I ask what inspired this gift?”

- *Allow person to share with you and make notes on your call log.*

Another helpful question you might ask is, “What made this gift possible at this time?”

- *Allow person to share with you and make notes on your call log.*

For calls made sometime after a gift is made

“Hello, this is (name) and I’m a board member with (name of organization). Today, I have the pleasure of calling you to just say thank you. I am not calling to ask you for a donation today, but rather to let you know that our past gifts, yours and mine, are truly making a difference at (name of organization)”

“Like you, I feel that it is a cause worthy of my support. I also give because it just makes me feel good! May I ask what inspired your giving to us?”

- *Allow person to share with you and make notes on your call log.*

“That’s great! Thank you for sharing that with me.”

- *Share briefly why you support the organization; if there are any similar reasons - make that connection*

“This year, we’re placing special emphasis on caring for our donors – keeping you informed and making sure we know what your interests and needs are. It’s a top priority of ours that you, as a donor, know the tangible impact you’ve made in the lives of the people we serve.

As well, accountability and financial responsibility to our donors is important to us as a board. It would help us to know what your expectations are of the charities in which you invest.”

©2006, updated 2012 The Osborne Group, Inc.

100 South Bedford Road, Suite 340

Mount Kisco, NY 10549

www.theosbornegroup.com

(Make sure you fully understand what the individual is saying to you, so feel free to ask clarifying questions like, “Can you say more about that?” Or, “Let me be sure I understand, you are saying that...” ; Your response could be “I’ll be sure to share that with other board members and staff. Thank you.”)

“I’d also like to let you know what your investment has allowed us to do.”

ADD YOUR OWN “Return On Investment” information HERE – following is a good example:

Recently we expanded our early intervention services for children across the state. This provides additional support for children from birth to 6 years of age and for their families. We can save the local community \$6 for every \$1 that we spend now and we can make a difference in the child’s quality of life. That’s the kind of investment I feel good about.

- Give the donor a moment to make any comments.

“Well, I don’t want to tie up any more of your time but is there anything you’d like to know?”

- Make note of any comments or requests

“Thank you for spending time with me today. I’ll call you with any new information in coming months. We really appreciate your input.”

“Thanks again. Goodbye.”

Note: For new donors, be sure to end by mentioning (and sending!) a New Donor Welcome Package. Here is an example of what you might say:

“Thank you again for your gift and for taking the time to speak with me. May I call you again in a few months? We are interested in how our donors feel about their investments in us and I’m especially interested in whether or not we are meeting your expectations. Until then, please look for a welcome package in the mail and have a great day.”

For Voice Mail:

“Hello, this is (name) and I’m calling on behalf of the board of directors of (name of organization). I just wanted to let you know how much we appreciate your support for our organization. I’m also a donor to (name of organization); I want you to know that your commitment to help others motivates me too!

This year, we’re placing special emphasis on caring for our donors. It’s a top priority of ours that you, as a donor, know the tangible impact you’ve made in the lives of the people we serve. I’ll try calling you again soon. I’d like to personally thank you and let you know what we’ve been able to accomplish with your investment in our mission. If you prefer, feel free to call me at (your best number).

Again, thanks for your generous support and have a great day!”

For Gatekeepers (Administrative Assistants, Secretaries):

Hello, this is (name) and I’m trying to reach (name of donor) on behalf of the board of directors of (name of organization). I will only take a moment of her/his time and really just want to say “thank you” from our board.

Can you give me a day and time that would be good for me to call? I only need 5 minutes to thank (name of donor) for her/his support.”

“Thank you (use the person’s name; if you didn’t catch ask here)! I appreciate your help. Have a good day.”

- *Please make note of any facts the gatekeeper may share – ie...the donor is at her/his son's school event or is out-of-town on a speaking engagement. This is all fodder for your next call.*
- *Also, note the gatekeeper's full name so that you can use it when you call back*

The Osborne Group is a full service management, consulting and training firm specializing in organizational management, opinion research and philanthropy. Our philanthropy work includes board and staff training, campaign consulting, internal assessments, feasibility studies and donor satisfaction surveys.

If you would like to learn more about the power of personal thank you and stewardship calls, the roles of board members and volunteers in leadership annual and major gift fundraising, or any other aspect of fund development, contact us at mail@theosbornegroup.com or 914 428-7777 or visit us at www.theosbornegroup.com

Like us on FACEBOOK