Mission Increase: Kevin Whitman "Making the Ask" Webinar transcript (1st half transcript, 2nd half video recording) including links to important resources.

Karen Swanson 00:25

Welcome everyone. Appreciate you taking the time to be with us today. The webinar is going to be on making the invitation, freeing leaders from the weight of the ask, and Kevin Whitman is our guest speaker, and we're so glad to have him here from Mission Increase. We're going to do Q and A at the end. So, if you save your questions, and then we'll have you put them in the chat at the end, and Kevin will be happy to get those questions and answer those. And I know he's got a lot of resources and things to share with y'all today, so I'm really excited about this this webinar. So, but let me just open us in a word of prayer. Dear God, We're so grateful for just the opportunity to serve you in the area of correctional ministry, and Lord, we need funds to do this work, and we know that you are always generous in your provision to us. So, Father, we are so grateful for that. Lord, we pray that you would help our time together to help us to be better stewards of what we do, as well as better at at doing the work of raising funds. Father, thank you for this opportunity in Jesus' name. Amen. Amen. Great. So, Kevin, I'm just going to turn it over to you.

Kevin Whitman 02:24

Excellent. Well, thank you so much for the very kind introduction. I am so grateful to be here with the team today. It's absolutely a privilege to be able to talk about inviting people into generosity and being able to make the invitation. I love the fact that at Mission Increase we get to talk about this all the time, and so I'm incredibly grateful that we have the opportunity to talk today. So I'm going to share my screen. I'm going to be giving some PowerPoints here, so bear with me as I start this up. We're going to be learning today about connecting with champions to make a financial invitation. We're actually going to be doing that in the context of what we call a major gift ask, which is somebody who could make a significant financial contribution to your organization. But the concepts we're going to be talking about today are transferable to any type of invitation that you would want to make, and we'll talk about that in a little bit here at the end of our time together. But today, I am confident that you will leave with a reemphasis on fundraising as ministry, and that ministry is both to you as the asker and as the one who is going to be doing the giving? I'm going to be sharing a lot of resources with you today. Elise from our team at Mission Increase is on the call with me today, and she's going to be dropping several resources into the chat throughout the conversation that we have today.

So the first thing that she's going to drop in there is this URL to this resource hub. In here, you're going to find some really great tools, and all of the resources I'm providing for you today are going to be in this resource hub.

All resources available on the resource hub:
https://learn.missionincrease.org/courses/making-the-invitation/

Elise is dropping that into the chat now. And at Mission Increase, everything that we do is based in biblical principles, and our time together today is going to show that we're going to talk about the biblical precepts. We're going to look at some basic principles, which are more our mindsets, and then we're going to look at the best practices. And you're going to walk away with some tools that you're going to be able to use. So I'd like to start us off today with a what I like to call a thought-provoking question, and I would like to open it up for responses. So, yes, I'm going to ask you to turn your camera on. I'm going to ask you to unmute. I'm going to ask you to be able to respond. But I'd love to see our response to this question: What are some common challenges or barriers leaders can experience when making a financial invitation. What are some common challenges or barriers that all of us can experience when we're making an invitation? Go ahead. I'd love to get some responses.

Kevin Whitman 05:45

Lack of network. So who do we know, right? Who who do we know that we could extend the invitation to? Great, excellent. Who else? Nick, I saw that you unmuted.

Speaker 2 05:57

Yeah, I would say just kind of knowing the the right amount to ask based on the individual's capabilities.

Kevin Whitman 06:03

Yep. How much do we know what to ask for? So who to ask and how much to ask for? Yep. What else?

Recovery Alaska Room 210 06:09

Kevin, this is Brian from Anchorage Alaska. Oh, this is Brian from Anchorage Alaska. One of the challenges we have is we focus on outreach of inmates and those families. So a lot of criminal history with individuals, and so that can be seemingly conflictive. You know, asking for support. Okay.

Kevin Whitman 06:30

All right. So cause-related things and asking. All right. What else? Anyone else?

Dale Evans 06:37

Good afternoon, everyone. I I believe also it is with all of the different entities out there for people that don't. It's just making a decision who to to give

Kevin Whitman 06:51

to. Okay, love that. So from their standpoint, who is the or what is the organization that is most connected to where my heart is in reference to this cause. Okay, great, thank you, Dale. Appreciate that. Anybody else?

Karen Swanson 07:06

Not too much and not too little when you're when you're doing your newsletter.

Kevin Whitman 07:11

Okay, so there we go. You have to have that right balance of content. Yep. Okay. Anyone else? Well, I appreciate everybody's comments so far, and I want you to be thinking about these things as we work together today, because there are some challenges, and we're going to address just about every one that we already referenced here. But we want to understand going into this that there may be some things that we need to overcome, and one of the biggest things that I know, in my experience, **we need to overcome the mindset that we have going into it.** So to start the process of really helping to change our heart, I want to first look at Scripture because the Bible has a lot to say about giving and generosity. So let's start in the Gospels with this really familiar passage of Scripture from Matthew says, "Ask and it'll be given; seek and you'll find; knock and it will be opened to you. For everyone who asks receives, and the one who seeks finds, and to the one who knocks it will be opened. Or which one of you, if his son asks him for bread, will give him a stone? Or if he asks for a fish, will give him a serpent? If you then who are evil know how to give good gifts to your children. How much more will your Father who is in heaven give good things to those who ask Him?"

At Mission Increase, we have 10 transformational giving principles that are based in Scripture that guide all of our work. And that **first transformational giving principle says God provides everything we need for what He's called us to do. And as a loving father, he desires to give us the absolute best gifts.** However, this verse is really clear that we're not just to sit back and hope; our responsibility is to ask. Do you see toward the end where it says, "How much more will your Father who is in heaven give good things to those who ask him?" Now, just pause for a second here and address the elephant in the room. Some of us might be thinking, Kevin, this is great news. All I have to do is ask God, and He's going

to provide, and that actually gets me off the hook of asking anybody else. Well, actually, recognizing that God is the ultimate provider changes how we ask other people to be able to connect in, and when we approach from the mindset that God is the ultimate provider, it frees us up to ask others, knowing that God is ultimately providing, and He's already setting things in motion for people to respond according to his prompting, let's look further into the New Testament, Romans 15. "Since I have longed for many years to come to you, I hope to see you in passing as I go to Spain, and be helped on my journey there with you once I have enjoyed your company for a while."

See, Paul wanted to spend time with like-minded people. Paul also knew that God would already be working in the hearts of these like-minded people to support Paul in the cause of evangelism. Our **second transformation of giving principle reminds us that God faithfully provides through the generosity of His people,** and I want to encourage you with this today. You have champions who are like-minded in your cause. So even our friends from Alaska that talked about you know the cause and the fact that you're you're what it is that you're working with, and people may have challenge with that cause. You have people who have a heart toward this cause. There are like-minded people in this cause, and God is already working on their heart to be able to be involved in the process. Let's look at another New Testament verse, First Timothy six. As for the rich in this present age, charge them not to be haughty, nor to set their hopes on the uncertainty of riches, but on God, who richly provides us with everything to enjoy. They are to do good, to be rich in good works, to be generous and ready to share. Thus, storing up treasure for themselves as a good foundation for the future, so they may take hold of that which is truly life.

Kevin Whitman 11:15

I want to look at that phrase in the first line that says, Charge them. That is a strong phrase, and it actually means to give solemn instruction. As we coach givers, champions in the cause, growing them in connection to the cause, part of that responsibility is to ask them to give, helping them recognize that God is the ultimate provider, and as they give, they experience what abundant life can truly mean. Let me ask you this question, and this is not a tongue-in-cheek question.

This is a legitimate question: Do we believe that fundraising is ministry? Do we believe the fundraising and ministry? Because it is fundraising is ministry, and as we ask, we are ministering to the giver, allowing them to receive the blessing that comes from walking in obedience to what God is calling them to do. One final scripture for today: Luke 6:45, "out of the abundance of the heart, the mouth speaks". The reason why I put this in here is because our view of money, those who have it and our need for it, has to be secure in God as the ultimate provider, or it will come out in our fundraising efforts. God is going to

transform you through the work that you are doing in fundraising, just as much as he is going to transform the people who are responding to that invitation.

So, as we look at these scriptures, I want to make some observations. First of all, I believe that asking requires a conviction of God's faithfulness. We have to know of whom we are ultimately asking, and that His posture towards us is completely consistent with His character. And God's character is that He is faithful, and He is abundant, and He is generous. And as we ask in faith, He will provide. I also believe that asking provides a great opportunity of both the asker and the giver, as the asker, are we being obedient to what God is asking us to do? And on the giving side, are we being obedient to respond as God directs? And the beauty of that is that on both sides, we are given a front row seat to God's divine work.

I also happen to believe that asking is a sacred task. Asking or charging, as the Timothy passage says, is a spiritually rich endeavor which will ultimately change us and grow God's kingdom. Henry Nowen, the theologian who wrote this book, A Spirituality of Fundraising. This book, this is my spokes model time right now. Tom am I doing to be able to show you the book**, A Spirituality of Fundraising, by Henry Nowen**. He says this: When we have gained the freedom to ask without fear, to love fundraising as a form of ministry, then fundraising will be good for our spiritual life. Absolutely, 100% believe that. I've seen it evidenced in my own life and hundreds of leaders I've had the privilege of working with. I also believe that asking reveals the asker's heart. Our givers will know our posture and our motivation for asking. You can say you're asking because you want something for them, and it's an opportunity for them to respond, but if your heart doesn't reflect it, your champions are going to know. You cannot fake it until you make it on this one. We have to do the hard work internally to be secure of our view of money.

So, having laid the biblical foundation, now I want to look at some basic principles that we believe are necessary for good financial invitations. Think of it as we just worked on the heart change. Now we want to work on a mindset change. These are the mindsets that are going to guard or guide the work that we do. And the first one is that financial invitations are rooted in relationship. It's going to be very challenging for you to invite someone to give, and even some of the challenges that were raised, which is how much and when and to who. You're going to have a real hard time knowing the answers to those questions if you don't know about that person and how they're connecting to the cause. We are looking to grow people to the broader cause to which we are connected. So one of the tools that I'm going to have Elise from our team drop into the chat right now.

Discovery Questions—use this tool before every meeting, look & determine what are a few things I need to discover going into this meeting.

https://mi-learn-prod.s3.amazonaws.com/wp-content/uploads/2026/01/09073307/Discovery-Questions.pdf

Kevin Whitman 15:52

Here's a link to this tool, which all these tools are in that URL that we at least already put on there for you. But here's a separate link to this particular **tool, it's discovery questions**, and it's designed as a template for you to think about champion meetings ahead of time, and what you need to discover about that champion to guide you in making the appropriate next invitation. Just a couple things regarding this. First of all, most of us go into meetings in report mode. I go in thinking, what do I need to tell this person? What do I need to convince them of? What story do I need to say? What do I need to be able to prompt them with so that they will respond in the way that I'm wanting them to respond. We go in in report mode.

I would love to challenge you. In fact, if there is one thing that we had to boil it down, and I would want you to take from the time that we have together today, it would be a true understanding of this concept. **Go into your meetings in discovery mode, not in report mode.** See, in my experience with ministry leaders from all sizes and all types of organizations, we go in in report mode about what we need to communicate. But I want to really encourage you: there will always be something new for you to discover about this champion, my wife and I have been married for 30 years. We just celebrated our 30th anniversary in June, and just within the last couple of months, we were having a conversation. And I looked at her and I said, "I never knew that about you. We've been married 30 years, and I learned something new about her I didn't know before. If I learned something brand new about my bride of 30 years, I know there are things about your champions that you don't know.

Let me give you a quick other very current example. I was having a conversation with a ministry leader yesterday in a coaching session, and we were talking about major gift work, and I asked him, "How do you believe that this person? Why are they connected to your cause?" And his response was, "Well, I think it's because of this." I said, "Have you ever asked them?" "Well, no, I just assumed that's what it was." Well, what would happen if I went in and said, "you know, you've been so incredibly generous for the past few years, and we've had really, really great conversations, but I don't know that I've ever truly found out from you what's the primary reason why it is that this cause connects so much to your heart. What is it?" And by discovering that, that's going to help me know exactly how to ask him into further connections to the cause because it's going to be based on what's good for him, not just what it is that I need.

So here's my input to you regarding this tool, I believe that these discovery questions are great for initial conversation starters. I also believe that they are really, really great for follow-up questions in the conversations that you're going to have with people. **But the way I would ask you to use this tool is before every meeting, I want you to look and determine what are a couple of things I need to discover going into this meeting. What's going to help me be able to make a better invitation when I know this information?** And again, just a couple practical ways of using this in my own life, in my own work. Using this, I've just started to be very candid with people and say, you know, I was thinking about the meeting today. I was thinking about the conversation that we were going to have and how much I enjoy being able to have connection with you. And I realize I know this and this, but I actually don't know this. I'm really curious. Could you could you give me some more information about that? I'd love to find out this about you, and I can tell you that people are not used to being asked questions like that, and it can actually be a gift because as we ask them, God reveals things to them. Another quick example, and then we're going to move on.

Kevin Whitman 20:19

Two years ago, I was having a conversation with a ministry leader, and and we were getting into a very deep conversation, deep, very very spiritually rich conversation, and I asked him a question, and I'll never forget it. He paused, and he turned to me, and he said, "The Holy Spirit is revealing something to me right now"-that was sacred ground that we were on at that point in time, because he'd not been asked that question in that way, and the Holy Spirit was using that as an opportunity to reveal something to him about his own life, his own heart, his own motivations. What a privilege to be able to be in a situation like that of recognizing we get to witness the work of God in the lives of our givers and our champions.

So I highly encourage you. Here's the best way to use that. The other thing is don't use these questions exactly the way that I have them written. I don't want you to sound like me. I want you to sound like you. So rephrase them. If you've got go-to questions that you use, absolutely use them because I want these to engage you in your conversations. I don't want you to go in sounding like you're having my conversation. I want it to be your conversation. Okay, so the very first thing they're rooted in relationship. You're going to be. It's going to be so hard to ask people to know what to give if we don't know about them. We don't know their motivations. We don't know who they are.

what is unique about your ministry? What is the outcome when you apply your solution to the problem? What is the invitation piece? This helps everyone on your team saying the same thing...

https://mi-learn-prod.s3.amazonaws.com/wp-content/uploads/2026/01/09073306/Case-for-Support.pdf

The next of our basic principles is that invitations are focused on mission, vision, and impact. They are grounded in the mission of the organization. They are empowered by the vision, and they are backed up by the impact evidenced when champions take action. One of the best tools that you can have as a foundation for that is a really well-crafted case for support. Okay, Elise from our team is dropping into the chat right now, a link to this case for support document, and it's a very easy way for you to build a concrete case for support statement in four very simple statements. So the way I describe **case for support: four statements, problem, solution, outcome, invitation.** This sheet will walk you through creating each of those. **So, what's the problem that you, as an organization, exist to solve?** Not what it is that you do, but why is the need there that you're doing it? What's the problem? What exists that you are in place to help solve.

Secondly, what is the solution that you provide? So, if this is the problem, how are you addressing that problem with your solution? This is your opportunity to be unique on what it is that you do. One of the things that came up in when I was asking about obstacles was there might be a lot of other organizations that are doing the same thing that we're doing. What's unique about you? What's God called you to do in this? What solution are you providing?

And the **third, what's the outcome that happens when you apply your solution to that problem?** What's happening as a result of it? How can you prove that this is working? And then the last: What's the invitation piece? How can now people become a part of this? Now we gave you an example. The examples that we gave are actually from an organization that we created at Mission Increase called Back to School Ministries. So don't go to the internet looking for Back to school ministries, you won't find it. Doesn't exist, but we created it as a fictional organization just for a lot of example purposes. But if you can put together a really well crafted case for support that will serve you well, and and it will help everyone on your team be saying the same thing. It's so important that we have unity in our messaging. Okay, so we want to make sure that it's grounded in the mission, vision, and outcome of the organization. We also understand that invitations are very strategic in nature. You're not going to give the same invitation to everyone. So, what is the strategic invitation to not only give this person, but to give this person at this time?

Now, that can be developed through your conversations with your champions and the place where their heart is connected to the cause. But I want to give you two other tools that I think can really help you with this, and I recognize today I'm giving you a lot of tools in a very short amount of time. So on one hand, I apologize for that because I know it's a lot. On the other hand, I want to resource you with as much as I possibly can. So that's why I'm giving you a bunch of resources today.

Strategic Priorities Worksheet: https://mi-learn-prod.s3.amazonaws.com/wp-content/uploads/2026/01/09073313/Strategic-Priorities.pdf **5 ways people can be involved in your mission**

So the next thing I want to resource you with is what we call a **strategic priorities worksheet**. When you are thinking through for your organization what you're asking people to give toward, have we really thought through what's going to be needed for that? So we've given you space on here for three strategic priorities. So you have up to three options of what it is you could put here. You don't have to use all of them. You can create more. We just give you the option of three. But what's the priority? How's it connected to the vision and what are the budgetary implications for that? Okay, it's just going to help you be able to narrow some things down. **Now, one of the things that's very distinct about mission increase is that we believe people connect to your cause in five main ways. Those are listed in the bottom part of this worksheet: give, pray, serve, share, and learn. People are going to connect to your cause in all five of those ways, not just in giving.**

So, in your strategic priorities, I want you to think through how can people be involved in this priority in those five ways. When you can flesh this out, you can be prepared for so many invitation discussions. I won't ask for a show of hands, but I have a feeling that sometimes some of us have gone into conversations like this, and someone asks us a question that we're not ready to answer, and we kind of look back with a blank stare in our face because we weren't ready for that one. When you've actually looked at these strategic priorities and how people can be involved, you've done your homework. This will really help you be able to have answers. So here's just another worksheet to be able to put into work for you as you're having these strategic financial conversations.

One Sheet Proposal helps you become prepared : https://mi-learn-prod.s3.amazonaws.com/wp-content/uploads/2026/01/09073310/Summary-of-a-One-Sheet-Proposal.pdf

Let me give you another tool regarding this. It's the summary of what we call a **one-sheet proposal. Okay, a one-sheet proposal is what you prepare to help you go into a**

financial conversation. It just helps you be able to be ready. What's the objective of the project? What's the background? What's the status? What's the financial need, where are we at? All of these things. Okay, so one sheet proposal helps you become prepared by helping you think through all of these things.

Two things. Number one, **the act of preparing this is the most beneficial part.** You may create this and leave it with someone as a follow-up for the conversation, and you can do that. But the act of actually creating this is what's going to be the gold for you. One of the phrases that I use in my own life all the time is that you have to plan to be spontaneous. When it comes to these conversations, you can see the way we've even got the order here listed on the sheet. We've got objective, background, status, financial need. Rarely is a conversation that you have going to be this linear. You ever found that to be true? It's going to jump all over the place. When we've done the homework of being ready, it doesn't matter what direction that conversation takes. We're ready for it because we're prepared. Okay, so be ready to be spontaneous with this conversation, and the process of putting this together is going to be the absolute gold for you.

Okay, we have done now what we believe are your basic principles in making a financial invitation. So they're rooted in relationship. We have to know who our people are, have conversations with them, and discover. And by the way, make notes so that you can go back and review them. Focused on the mission, vision, and impact. Where are you headed as an organization? Do you have those statements really clearly defined so everybody is saying the same thing, and how are we preparing for the strategic nature of these conversations? Major gift relationships are very strategic in nature. All right, so now we get to put it all together into some best practices, because confidently asking champions to give generously requires taking those heart changes and the mindsets, and now integrating them in to best practices. So, when it comes to best practices, the first thing that I want you to look at is your posture, and no, I am not talking about sitting up straight when you go into meetings. Although I highly recommend that.

Please go to the VIDEO RECORDING for the remainder of the webinar. Here are the links discussed at the second half of the webinar:

A Spirituality of Fundraising: The Henri Nouwen Spirituality Series:

https://a.co/d/06KmpxWz

Workbook: https://a.co/d/05kgCkl4

Examine Our Thoughts About Wealth:

https://mi-learn-prod.s3.amazonaws.com/wp-content/uploads/2026/01/09073304/Examine-Our-Thoughts-About-Wealth.pdf

Major Gifts Tracking Spreadsheet: Major-Gifts-Tracking-Spreadsheet.xlsx

Getting the Meeting:

https://mi-learn-prod.s3.amazonaws.com/wp-content/uploads/2026/01/09073312/Getting-the-Meeting.pdf

Anatomy of a Financial Invitation:

https://mi-learn-prod.s3.amazonaws.com/wp-content/uploads/2026/01/09073309/Anatomy-of-a-Financial-Invitation.pdf

Next step



If you want to learn more, check out these links below!

Mi Core https://missionincrease.org/mi-core/

Mi Academy https://learning.missionincrease.org/mi-academy-overview

Mi Specialized https://missionincrease.org/mi-specialized/