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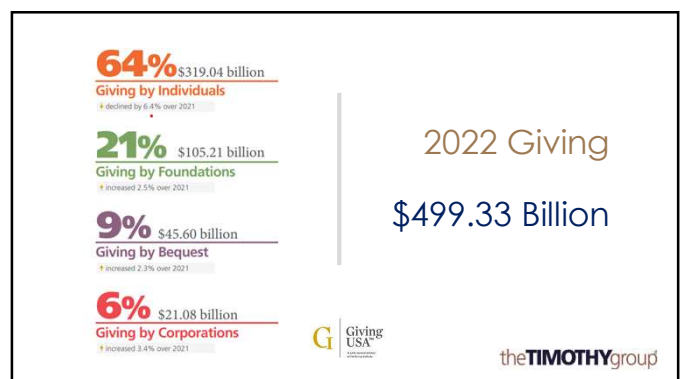
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“ If you don't know where you're going you're liable to end up somewhere else.”

Yogi Berra, Philosopher

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5 Markets

- 1 Individuals
- 2 Churches
- 3 Foundations
- 4 Businesses
- 5 Corporations



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Individuals

- 1 Board Members
- 2 Major Donors
- 3 Mid-Level Donors
- 4 General Donors
- 5 LYBUNT/SYBUNT



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Churches

- 1 Build Strategic Connections
- 2 Multiple Decision Makers
- 3 Cultivate, Cultivate, Cultivate
- 4 Special Offerings, Regular Support
- 5 Great place to meet individual donors



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Foundations

- 1 RESEARCH
- 2 Approach like a Major Donor
- 3 Know Their Process
- 4 Multiple Decision Makers
- 5 PAPERWORK!



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Business/Corporations

- 1 Look for an Internal Advocate
- 2 Listen for how to Communicate
- 3 Faith-based Worldview
- 4 Multiple Decision Makers
- 5 Matching Gift Opportunities



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5 Methods

- 1 Direct Mail: 1%-5%
- 2 Phone: 30%
- 3 Events: 50%
- 4 Digital Media: >1%
- 5 Personal Solicitation: 75%-85%



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Direct Mail

- 1 Message from Leadership
- 2 Stories with Photos
- 3 Emotion & Logic
- 4 Call to Action
- 5 Response Device



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When it has to be a Letter

Clear, short, and direct

You won't get milk from a cow by sending a letter. You won't get milk by calling on the phone. The only way to get milk is to sit by its side and milk it.

Si Seymour



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Phone

- 1 Mid-Level Donor Calls
- 2 Board Thank You Calls
- 3 LYBUNT/SYBUNT



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Events

- 1 Banquets
- 2 Golf, etc.
- 3 Tours
- 4 Vision Trips
- 5 Small Gatherings



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Digital Media

- 1 Website Giving Page
- 2 Email Campaign
- 3 Social Media



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Personal Solicitation

- 1 Board Members
- 2 Major/Mega Donors
- 3 Business Leaders
- 4 Parents/Grandparents
- 5 Foundation Directors



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Are You Ready for a Capital Campaign?

Strategic Plan – Do you have a clear plan of what God wants you to accomplish?

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Campaign Prep



ALIGNMENT

- Does your team agree on direction?
- Is your board supportive?
- Are you willing to commit time and effort?

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Campaign Prep



TEAM

- Is the president willing to ask?
- Do you have the right team?
- Should you add team members?

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Campaign Prep



CURRENT SUCCESS

- Is your annual fund growing?
- What percent comes from major donors?
- How many new donors this year?

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PATH TO SUCCESS

The critical path to campaign success:



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PATH TO SUCCESS

PRE-CAMPAIGN PHASE

Key questions:

- Would you consider contributing to this campaign over the next 3 years, over and above your current giving?
- Please estimate the amount you might consider giving.
- Would you serve as a volunteer?

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PATH TO SUCCESS

PRE-CAMPAIGN PHASE

- Whom will you survey?
- This is not a random survey but a focused conversation with your key friends.
- 30-50 personal/zoom interviews
- 300-500 online/mail surveys

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PATH TO SUCCESS

COMPELLING CASE

- Your campaign must solve urgent problems and answers to pertinent questions.
- Consider the 3P's: personnel, program, and property.
- Donors want to know the why and purpose of your campaign.

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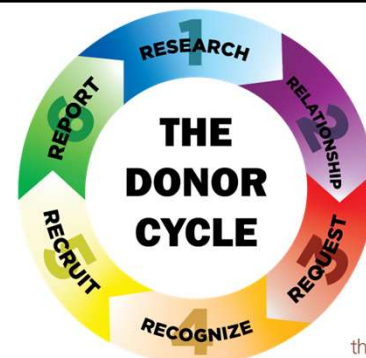
Session 1
Laying the Foundation

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Session 2
Cultivating Relationships



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DONOR ENGAGEMENT RESEARCH

- Who do you know?
- Consider the Link – Interest – Ability.
- Look for stewardship focus, heart for ministry, appreciation for the work you do, and relationship openness.

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DONOR ENGAGEMENT RESEARCH

“Old Clyde” Types

Beware of stereotyping donor prospects.



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DONOR ENGAGEMENT RESEARCH

- Segment your donor list.
- Identify your Top 50 – 100 donors.
- Utilize the Top 10 – Next 20 method.
- Conduct a wealth asset screen.

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DONOR RESEARCH

Donor Name	Estimated Net Worth
Kristen Preston	\$17,900,000
Shirley Sanford	\$17,200,000
Mike Holmes	\$14,100,000
Tim Hoffman	\$13,000,000
Jaime Johns	\$10,300,000
Christina Fowler	\$10,300,000
Gwendolyn Holden	\$10,200,000
Michele Ewing	\$8,700,000
Garrett Phillips	\$6,500,000
Kristin Peck	\$6,300,000
Troy Harris	\$5,800,000
Dale Holmes	\$3,900,000

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DONOR RESEARCH



HIDDEN GEMS

These prospects have capacity and are already giving to other nonprofits.



DISTINGUISHED PHILANTHROPISTS

Major gift donors that donate to your cause but may have additional capacity.



NOT NOW PROSPECTS

Individuals that do not appear to be philanthropic with any nonprofits.



YOUR CHAMPIONS

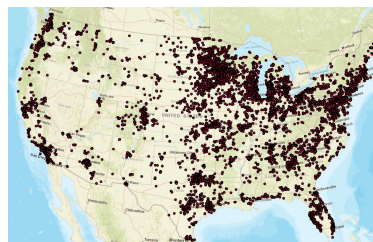
They donate to your cause but are not on the radar of other nonprofits.

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DONOR RESEARCH

Where are your donor clusters?



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DONOR ENGAGEMENT RELATIONSHIP

- Cultivating donor relationships is key.
- The donor relationship is a marriage between your mission and their values.
- Know your donors (store contacts, birthdays, kids' names, pets, interests, etc.)

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DONOR ENGAGEMENT RELATIONSHIP

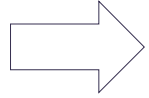
Major gifts require 3 components:



Head



Heart



Call To Action

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FUNDRAISING'S BIGGEST CHALLENGE

The FUD Factor

Fear.
Uncertainty.
Doubt.



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The Reluctance to Ask

- I'm uncomfortable with asking.
- I'm not sure we should ask for gifts.
- We've never done it like this before.
- I think God will meet our needs, so we don't need to ask.
- I'm not sure asking for gifts is biblical.



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Answer the Questions the Donor is Asking

- Why me?
- Why us?
- Why this?
- Why now?



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A Comfortable Place The Kitchen Table

In every home I've known the living room's a tomb.
In every home I've ever known, the dining room's the room. Adam Gopnick



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Silence is Golden

Ask, then listen

It is a balancing act for leaders to know when they should talk and when they should just listen.

Roxi Hewertson



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The Golden Rule

Fundraising is Friend-making

Treat the potential donors the way you would want to be treated.



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Influencing the Gift

Leadership in Fundraising

A fundraiser equips a donor with the needed **information** and inspires them with **motivation** to make a gift.



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DONOR ENGAGEMENT REQUEST

Who? The right prospect.
What? The right project. The right gift amount.
When? The right time.
Where? The right place. The kitchen table.
Why? The right person.

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DONOR ENGAGEMENT REQUEST

"I do not like to have anyone tell me what it is my duty to give. But I do like a person to say to me, 'We are trying to raise \$4,000,000, and are hoping you may be desirous of giving ____ dollars.'"

~John D. Rockefeller

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DONOR ENGAGEMENT REQUEST

"Based upon your understanding and appreciation for our ministry, would you prayerfully consider a gift of \$1,000,000?"

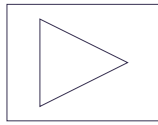
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DONOR ENGAGEMENT RECOGNIZE



Thank you

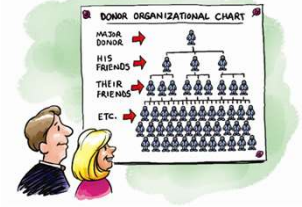


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DONOR ENGAGEMENT RECRUIT

Donors are both customers and salespeople.



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DONOR ENGAGEMENT RECRUIT

"Let me get this straight. I'm a little old lady with money and you want me to ask other little old ladies for money?"



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DONOR ENGAGEMENT REPORT

- How is the gift being used?
- What is the eternal impact?
- Share stories of how their gift is making a difference.
- Share answered prayer.



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Bringing Meaning to Money Fundraising is Stewardship

Fish prefer worms. So, when I go fishing, I don't think about what I want. I think about what they want.



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	Gift Amount	# Gifts	Total Amount
GOLD	\$ 1,500,000	1	\$ 1,500,000
	\$ 1,000,000	1	\$ 1,000,000
	\$ 600,000	1	\$ 600,000
	\$ 450,000	2	\$ 900,000
	\$ 300,000	3	\$ 900,000
	Subtotal	6	\$ 4,900,000
SILVER	\$ 100,000	5	\$ 500,000
	\$ 75,000	5	\$ 375,000
	\$ 50,000	8	\$ 400,000
	\$ 25,000	10	\$ 250,000
	Subtotal	28	\$ 1,525,000
BRONZE	\$ 10,000	15	\$ 150,000
	\$ 7,500	20	\$ 150,000
	\$ 5,000	25	\$ 125,000
	\$ 3,000	35	\$ 105,000
	Subtotal	95	\$ 530,000
General Gifts (ie. <=\$1,000)		1,000	\$ 545,000
TOTAL		1,131	\$ 7,500,000

Gifts Chart

Top 8 gifts account for two-thirds of the goal.

Top 20 gifts are almost 80%

1.8% gave 80%

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A Successful Donor Visit

When the right person asks the right person for the right amount for the right project in the right place at the right time.



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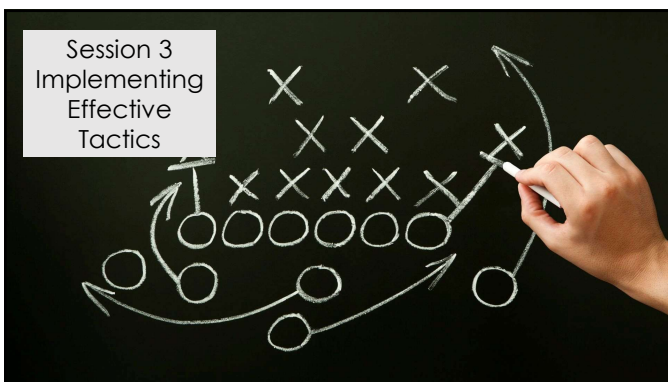
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Session 2 Cultivating Relationships



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Session 3 Implementing Effective Tactics



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Fundraising Focus

A campaign is a series of individual campaigns with 10 to 100 of your most capable donors.

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Fundraising Facts Bigger Dollars Add Up Faster



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Fundraising Facts



You've
Got to Fish
in the Right
Ponds

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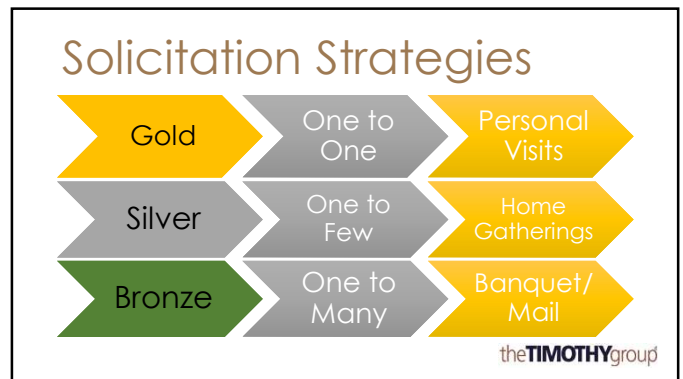


PATH TO SUCCESS

Campaign Gifts
can be 10 to 25
times annual gifts

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Quiet/Leadership Phase

- Recruit Campaign Leadership
- Secure Lead Gifts
- Prepare Campaign Materials

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Campaign Chair



"Everything rises and falls on leadership."
John Maxwell

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Prayer Team



"Prayer is my first advice.
Prayer is my second suggestion.
And prayer is my third suggestion."
Dr. Billy Kim

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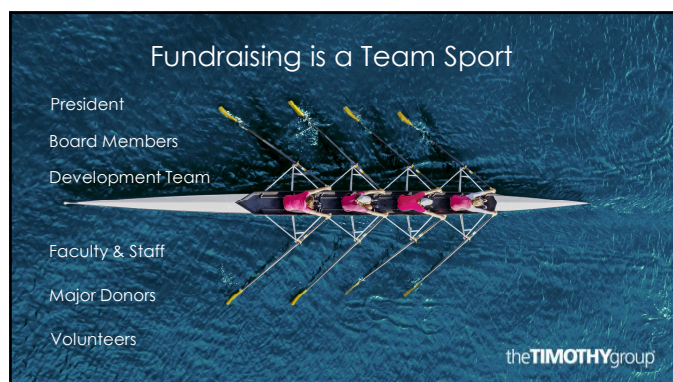
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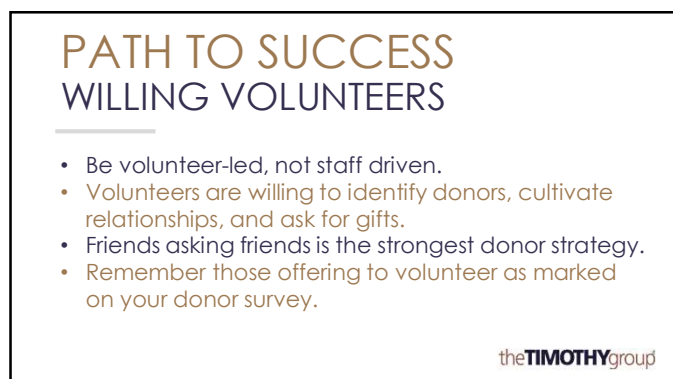
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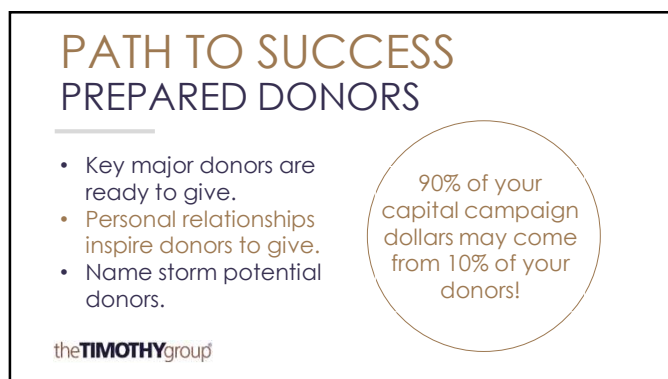
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PATH TO SUCCESS



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Not Just Events... DONOR EVENTS



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The Best Events SMALL GATHERINGS IN HOMES



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PATH TO SUCCESS MAINTENANCE PHASE

- Secure 36-month pledge payments
- Report campaign progress
- Continue to share success stories
- Cast vision for the future

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Create a Fundraising Culture More than asking

Culture eats strategy
for lunch.

Peter Drucker



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Create a Fundraising Culture Practice Max DePree's famous leadership statement:

- a. We define reality for our donors.
- b. We serve them.
- c. We know what we owe them.
- d. We say thank you.

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Create a Fundraising Culture

More than asking

- Focus on face to face and voice to voice contacts.



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Create a Fundraising Culture

More than asking

- Don't spend a lot of money to raise a lot of money.



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Create a Fundraising Culture

More than asking

- Communicate often with each other.
- Be relationship driven not event driven.



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Create a Fundraising Culture

More than asking

- Present vision to communicate need.
- Don't be afraid to ask.
- Set big goals.



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Create a Fundraising Culture

More than asking

- Maximize your time and effort.
- Encourage good biblical stewardship.



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Create a Fundraising Culture

More than asking

- Listen to your donors and honor their wishes.



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Create a Fundraising Culture

More than asking

- Don't take no from a person who cannot give you a yes.

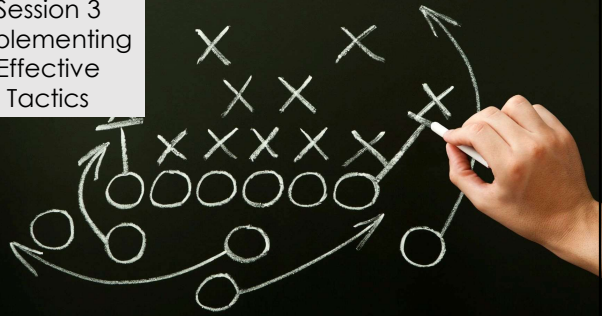


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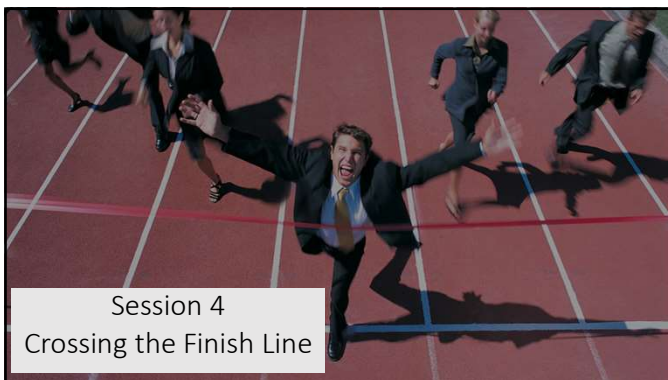
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Session 3

Implementing Effective Tactics



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Session 4

Crossing the Finish Line

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TWO REASONS

CAMPAIGNS STALL

- Not Enough Donors
- Not Enough Asking



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Next Level Fundraising



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Fundraising Role of the President

How much time will you devote to fundraising?



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CONUNDRUMS WATCH THE NO'S

- Groundbreaking scheduled. NO building.
- New Development Director. NO mentor.
- Large Board. NO involvement.
- Presenting opportunity. NO motivation.

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6 Detailed Action Steps to Engage Donors

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① Scheduling

THE DONOR CALL

Scheduling a meeting is often the most difficult part of the stewardship process. It takes discipline to set aside time daily and weekly to be on the phone, or text or both, encouraging partners, scheduling face-to-face visits.

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No Surprises Scheduling the Ask

Communicate to the donor that, with their permission, you want to present to them a project for their consideration. Let the donor know that you are seeking their involvement.



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Listen to Your Donors

They will tell you what,
when, and how much to
ask for.



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Sample Script

"Hello Bill, this is Fred, just checking in on you and Mary to hear how your summer is going..."

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- Start with small talk.
- Ask how God is working in their lives.
- Listen and let your donors share their life with you—its relationship building and revitalizing.

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The Call Should Accomplish 5 Goals

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① **Thank Them** – for their ongoing investment in your ministry and the eternal impact they are making with the people you serve.

② **Update Them** – on your life, family, church, business, and plans that involve your ministry (prayer journey, a mission trip, special event). Invite them to a special event or gathering.

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③ **Share Excitement** – with a story of how your ministry changed a life or one or two key metrics demonstrating forward momentum.

④ **Give a Glimpse** – by sharing your 60-second pitch on how the campaign will make a difference for Christ. Give a 30,000-foot overview of key reasons why it's the right next step for your ministry.

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⑤ **Ask for Face-to-Face Meeting**

"Could we schedule a time to meet?
I would love to share our plans and ask for
your prayer and financial support."

(Remember—the goal of the phone call is to schedule the meeting, not ask for a gift.)

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② Visiting

THE DONOR

The kitchen table is where donors make true stewardship decisions. This personal setting creates the best environment for asking. It gives uninterrupted time and donors feel more comfortable to ask questions and share thoughts.

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DURING THE VISIT...

- Share details about the campaign, answer their questions, and make a request.
 - Encourage them to network with their friends and become "friend raisers".
 - Visit your top 50+ donors in person annually.
-

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③ Answering

Donor Questions

Clearly share the vision and answer every question. Here are some scenario questions and answers that may help you during this crucial step.

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QUESTION

WHY NOW?

ANSWER

As we look at our opportunities to serve others, This new facility will help us reach more people more effectively. We are convinced that the hour is late and we sense an urgency from the Lord to accomplish all we can.

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QUESTION

WHY SO MUCH MONEY?

ANSWER

We have carefully reviewed our needs and the space required to meet those needs. Our goal is to solve our current restrictions and allow room for future growth. Our building will be functional, but not extravagant.

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QUESTION

ROI & SROI

ANSWER

Let's start with the spiritual return on investment. (Add some key metrics for your ministry.) We are good stewards of the resources God has entrusted to us. Our fundraising expenses are ___% of our budget, which aligns with other ministries of our size.

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④ Making

The Ask

Should be a smooth transition leading up to asking these 5 crucial questions during the kitchen table visit.

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- ☐ Will you continue to pray for the ongoing ministry and for open doors as we share this campaign with our partners?
- ☐ Will you consider a gift of \$200,000 per year for the next 5 years over and above your current level of giving, for a total of \$1M? (Determine the ask amount for each visit in advance.)
- ☐ How could you help us open that door to an individual friend, family member, someone at your church, or a foundation, corporation, or business contact?
- ☐ Have you included our ministry in your estate plan? Would you be interested in a further conversation about that opportunity?

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⑤ Following Up

Your Donor Visit

This is a key step in the stewardship process. Be prepared for more questions and consider these responses.

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RESPONSE

WOW, THAT IS MORE
THAN WE WERE
THINKING
OF GIVING.

ANSWER

We understand.

This is the largest step of faith in the history of our organization. We are asking our ministry partners to prayerfully consider making the largest, most generous, and sacrificial gift they have ever made.

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RESPONSE

WE NEED SOME TIME
TO THINK AND PRAY
ABOUT OUR
DECISION.

ANSWER

We are delighted that you think enough of this opportunity to take this before the Lord in prayer. Will a week or two be enough time for you to pray and decide? May I call you in a couple of weeks to answer any questions and hear what God prompts you to give?

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RESPONSE

HOW COULD YOU
HELP ME WITH MY
PLANNED
GIVING/ESTATE
PLANNING?

ANSWER

We have trained specialists who are experts in all areas of planned and deferred giving. They can help you by reviewing your existing plan or help you create a plan that will reflect your heart to impact the kingdom for God's glory. We can schedule a phone consultation with one of our experts.

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RESPONSE

WILL YOU BE SENDING
US A PLEDGE CARD,
COMMITMENT
DEVICE OR A LETTER OF
INTENT?

ANSWER

Yes, once you have made your decision, we will send you a letter of intent. It will detail our understanding of your commitment and when you plan to fulfill your pledge. This helps us plan as we move forward with our project. We can complete much of the information over the phone.

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RESPONSE

IF WE REFER OUR
FRIENDS AND
INTRODUCE
THEM TO YOU, HOW
WILL YOU
TREAT THEM?

ANSWER

We practice the "Golden Rule" and treat your friends how you would treat them. We believe giving is based on relationships and that building trust is key to long-term partnerships.

- Perhaps you could invite your friend and me to where I can listen to his or her giving interests.
- A home gathering is another way to introduce our ministry to your friends.

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FOLLOW-UP WITH A HAND-WRITTEN NOTE

Sample

"Thank you for the wonderful visit in your beautiful home to catch up on our lives and share our exciting campaign. We trust you will give prayerful and careful consideration of our invitation to be a leader in this campaign with a 5-year commitment of \$1 million dollars. I will call you in a couple of weeks. Thanks again. Your friendship and partnership mean so much to us."

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⑥ Nurturing

Your Donor Relationship

Take a personal interest in your donors and connect as often as you can.

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ADDITIONAL TOUCHES



Personal visit to catch up and share life.



Phone or virtual call to give a campaign update or share a story.



Text or email to ask for or offer prayer. Share an article, website or resource link.



Hand-written note or special occasion card to congratulate or celebrate.

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THE ABC AND D ASK TOUGH QUESTIONS

- Do you have an exciting strategic plan?
- Do your trustees give generously?
- Is your CEO an effective fundraiser?
- Is your annual fund drive successful?

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THE ABC AND D ASK TOUGH QUESTIONS

- Do you balance the annual budget?
- Are donors, faculty, staff, parents, alumni, and students proud of their alma mater?
- Can you explain what makes your institution unique?

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THE ABC AND D BEFORE MOVING FORWARD

- If any of the "A" Questions had a negative response, you are not ready.
- Consider the cost of a failed campaign.
- Go resolve any issues.
- Get ready with a good plan.

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THE ABC AND D CAMPAIGN FOR ALL YOUR WORTH

- Solicit Trustees first.
- Recognize the importance of the President and the VP for Advancement.
- Conduct the Leadership phase.
- Invite everyone to participate.
- Celebrate the victory!

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THE ABC AND D DO IT AGAIN – ONLY BIGGER!

- Don't disband your entire campaign team.
- Establish new goals.
- Recognize (say thanks) and Recruit (network with their friends).
- Build a strong stewardship program (annual, capital, endowment funding).

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HOLY BOLDNESS

"Once we are prayerfully committed to placing our whole trust in God, and have become clear that we are concerned only for the Kingdom; once we have learned to love the rich for who they are rather than what they have; and once we believe that we have something of great value to give them, then we will have no trouble at all in asking someone for a large sum of money."

~Henry Nouwen~

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Resource Link Sample Materials

- Presentation Copy
- Sample Annual Fund/Financial Plan
- Sample Development Calendar
- Sample Ask Piece (3)
- Sample Personalized Ask Piece
- Much, Much More!



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The 4 C's



See the People!
See the People!
See the People!
See What God Will Do!

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Leading Effective Capital Campaigns & Cultivating Major Donors



Pat McLaughlin, President and Founder
Ron Haas, Vice President

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YOUR FUNDRAISING PARTNER SINCE 1990

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