

Stewardship Kaleidoscope Workshop

# Effectively Communicating Financial Need for Maximum Fundraising

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Askala Harris Calhoun, Director of Fundraising Training and Learning Partnerships  
The FOCUS Group

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**Why is what we are covering today  
important to a “small shop”?**

**Tell Us A Little About yourself to receive additional videos, sample Cases for Support, and sample annual fundraising plan templates!**





# Overview #1

The Six Key Principles of  
Taking Donors Seriously® &  
The Fundraising Framework

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# Six Key Principles of Fundraising

People give to people they know and people they trust

People give because they are asked and shown how

People give when they are involved and have a sense of ownership

Giving is a way of life

A "no" is never forever...or a "no" has context

Proper planning maximizes results and minimizes costs

# The Taking Donors Seriously® Fundraising Framework

Case  
Leadership  
Prospects  
Strategy  
Plan





# Overview #2

Ten Elements of the  
Case for Support to Use as a storytelling tool in  
Discussions with Donors or Prospects

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# Strategic Planning Guides the Case

- Can you start here with your board?
- Affirms your mission and vision
- Validates predicted outcomes
- Creates "buy in" by key constituencies
- Demonstrates organizational competence
- Re-examines strategic assumptions
- Signals leadership effectiveness



# The Fundraising Case

- **What is it?**

- Best, clearest articulation of your mission and how you fulfill that mission.
- The required budget and proposed strategy are to raise the needed funding.
- Includes deliverable and measurable outcomes.

- **How is it used?**

- In personal meetings with prospective donors where the individual or couple has been told prior to the meeting that there is a fundraising agenda.

- **Who is it for?**

- Major Donors

# Ten Elements of Case for Support & Why These Elements Matter in Donor Communication

1. Theme / Title Page
2. Need
3. Mission
4. Lifetime Value
5. Program
6. Accomplishments
7. Vision for the Future
8. Financial Needs/Budget
9. Gift Plan
10. Leadership Profile



*Bridging*

**THE GAP**

EQUIPPING LEADERS TO TRANSFORM THE WORLD  
WITH THE GOSPEL OF JESUS CHRIST.



GLOBAL ACTION

# Theme

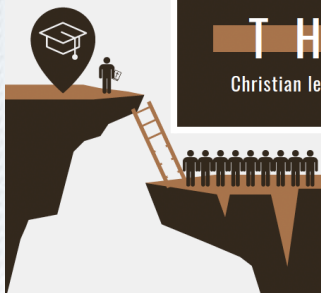
- Often the hardest piece of the case to decide on.
- Will appear as a single thread throughout.
- Should express, in a creative way, the communications objective of your case statement.



# Need

- The problem your organization is uniquely positioned to solve (not financial needs).
- Use a combination of statistics and anecdotal information.
- Try to make your needs and programs parallel. How do you address the problems you have laid out in the need.

EQUIPPING LEADERS TO TRANSFORM THE WORLD  
WITH THE GOSPEL OF JESUS CHRIST.



## THE GAP:

Christian leaders can't get access to the biblical education they need.

9 out of 10

PASTORS HAVE NEVER RECEIVED  
FORMAL BIBLICAL TRAINING<sup>1</sup>

*"It is impossible for someone who lives in Bhutan to have theological training. And at my age, I can't leave my family for 2 or 3 years to receive theological training elsewhere."*

—Cornelius, Bhutan

### WHY?

- They can't afford it
- They live too far away
- They don't have the educational background they need
- They can't leave their family, ministry, or other work
- They live in a country that persecutes Christians or prohibits Christian institutions

*"I have pastored for many years in a rural church...and access to materials and preparation courses for leaders has been very difficult to obtain."*

—Esteban, Cuba

## WHAT'S THE BIG DEAL?

What people believe about the Gospel, marriage, poverty, race, and money matters. These beliefs shape every aspect of a leader's life—along with the lives of those following their example.



Healthy leaders will grow healthy churches



Equipped leaders will impact their communities



Informed leaders will prevent the spread of false teaching

7.8  
BILLION

PEOPLE IN THE  
WORLD<sup>2</sup>

5.3  
BILLION

PEOPLE WHO DON'T  
KNOW CHRIST<sup>3</sup>

3.3  
BILLION

PEOPLE CONSIDERED  
"UNREACHED"<sup>4</sup>

1.3  
BILLION

PEOPLE LIVING IN MULTI-  
DIMENSIONAL POVERTY<sup>5</sup>



WHAT IS THE GLOBAL CHURCH ASKING FOR IN THE FACE OF  
SUCH URGENT PHYSICAL AND SPIRITUAL NEEDS?

*Biblical Leadership Training.*

Ever since we were founded in 1998, we've been listening to the global church to learn how we can best serve them. *What we heard and saw surprised us.*

What they desire is the leadership training they need to transform their own communities with the Gospel.

*"Theological training is the greatest source of  
weakness for the Church."*

—Operation World

# Mission

- Why you exist - uniquely designed to address the need.
- Use your mission statement - do not recreate the wheel, but use fresh language and interpretation.
- Include core values, and/or a brief history or timeline of your organization.
- The appeal should relate back to mission.



## HERE'S WHAT WE DO:

We equip leaders in hard places to transform their communities with the Gospel.

### EQUIPPING LEADERS IN HARD PLACES

We focus our resources on underserved pastors and churches in the developing world. Instead of training missionaries to go to "the outermost parts of the earth," *we seek out gospel movements in those places and resource the leaders who are already there.* These leaders already speak the language, understand the culture, have deep relationships and spheres of influence—they are uniquely positioned for impact in places that Western missionaries would have trouble accessing!

### TO TRANSFORM THEIR COMMUNITIES

We believe that equipping and resourcing local churches and pastors in the poorest parts of the world is the most sustainable way to impact communities. Instead of putting band-aids on systemic problems through charity, *we focus on equipping national churches to meet societal needs long-term.* Healthy churches are the hands and feet of Christ: they feed the poor, care for orphans, dig wells, provide medical care for the sick, model healthy families, and more. This is sustainable charity!

### WITH THE GOSPEL

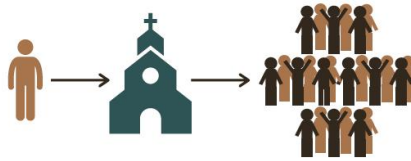
The Gospel is at the very heart of all we do. We are dedicated to carrying out the Great Commission, found in Matthew 28, by *equipping church leaders to lead disciple-making churches.* We strive to make our training transferable by keeping it simple, practical and focused. Our desire is to disciple the disciple-makers, and we are ultimately trying to help people follow and glorify Christ forever.

We're bridging the gap between  
Leaders and Biblical Training  
and  
Communities and Gospel Transformation.

# Lifetime Value

- What is the long-term impact of your mission on individuals and communities? Over 10–20 years?
- Assure donors of the return on their investment.
- Do not forget human interest - stories, quotes, testimonies.

# THE MULTIPLICATION EFFECT



Each leader we train directly impacts an average of  
**75+ PEOPLE** on a regular basis in  
their very first year.



## The IMPACT of ONE LEADER

By focusing on mobilizing Christian leaders in the hard places of the world, we are able to provide long-term, sustainable impact. The leaders we train go on to:

**TRANSFORM**  
*Their*  
**COMMUNITIES**

Teach the true, complete Gospel.

Evangelize, baptize, and make disciples.

Lead healthy, multiplying churches.

Model a Christ-like care for the poor.

Feed the hungry, care for orphans.

*Transform their communities.*



# Programs

- How you do what you do as it relates to your mission?
- What is the scope of programs and activities?
- Who are you serving?
- How are you serving them?

## OUR CLASSES: A Foundation for Gospel-Centered Ministry

### THE ABC'S OF GLOBAL ACTION

#### ACCESSIBLE

We believe that biblical education should be accessible to anyone who has been called by God to serve the church, regardless of the income inequality in the world.

#### BIBLICAL

We are committed to giving our students a foundational theological education that is rooted in the Scriptures.

#### CONTEXTUAL

We are dedicated to ensuring that the unchanging message of the Gospel is translated into every culture in the most relevant way possible.

We provide a one-year intensive program that provides pastors and leaders with a Biblical foundation for effective ministry—and how to provide gospel-centered leadership that transforms their communities. They are given an intensive survey of the Bible, with a strong emphasis on the gospel and the skills they need to engage in effective evangelism, teaching, discipleship and community transformation.

- We teach in the **hard places** of the world (Africa, South Asia, Latin America, the Caribbean, and Eastern Europe), in **local settings and languages**.
- We conduct classes in a **modular format** to allow our students to continue serving their churches.
- We use **qualified international faculty** to teach in our program. These faculty members are respected & credentialed pastors, leaders, and academics, the majority of whom hold advanced degrees.
- We emphasize the **practical skills** leaders need to apply Scripture to their life and ministry, following a biblical model for godly leadership in the church—which is often very counter-cultural!
- We focus on **community-oriented, concentrated learning experiences** which encourage group involvement and relationship-building.

"For no one can lay a foundation other than that which is laid, which is Jesus Christ."

—1 Cor. 3:11

## WHAT WE TEACH

### 1) Christ & the Biblical Story

An overview of the biblical story with Christ at the center

### 2) Old Testament

A survey of the O.T. and its application for life and ministry

### 3) New Testament

A survey of the N.T. and its application for life and ministry

### 4) Biblical Interpretation

How to faithfully interpret the whole counsel of God

### 5) Bible Doctrines

A survey of the major doctrines of the Bible and their relevance for life and ministry

### 6) Effective Teaching

How to teach and preach in order to transform lives

### 7) Healthy Churches

How to lead a growing, gospel-centered, healthy church

### 8) Biblical Leadership

How to lead like Jesus, who equipped 12 people to change the world

### 9) Community Transformation

How the church and the gospel can transform your local community

# Accomplishments

- Describe the impact of your programs on those you serve and the greater community.
- Use whatever possible to illustrate impact:
  - Objective data
  - Anecdotal data - stories, testimonials



# IMPACTING *the* WORLD

11,350+

Leaders Trained Worldwide Since 1998

851,250+

People Directly Impacted Each Year by Our Trained Leaders\*

4  
Continents

8 Languages We're Currently Training In  
5 Languages We're Aiming to Train In

REGIONS and LANGUAGES



**SOUTH ASIA**

Hindi  
Tamil  
Telugu  
Nepali  
Bengali†



**LATIN AMERICA & THE CARIBBEAN**

Spanish  
Portuguese†



**EASTERN EUROPE**

Ukrainian  
Russian†  
Hungarian†



**AFRICA**

English  
Shona  
Ndebele†

130  
International  
Faculty Members

94%  
of Faculty are  
Non-Western

Non-Western faculty:

- Possess innate cultural competency
- Maximize class time by teaching without an interpreter
- Aren't stopped by border closures and travel restrictions

\*Based on an average of 75 people served through the churches or ministries of our students.

†Translation planned for 2022

## LASTING IMPACT



565  
Leaders  
Equipped in  
2020



1,366  
Leaders Equipped  
in 2021



2,198  
Leaders Equipped in  
2022



2,557  
Leaders Equipped in 2023

1,125,000+  
People Impacted

Each year by leaders we have equipped\*

\*Based on an average of 75 people served through the churches or ministries of our students.

Currently equipping leaders in

20  
Countries

(India, Nepal, Bangladesh, Andaman Islands, Bhutan, Ukraine, Belarus, Hungary, Zimbabwe, South Sudan, Uganda, Kenya, Cuba, Guatemala, Costa Rica, El Salvador, Panama, Colombia, Peru, Ecuador)

Each leader we equip goes on to directly impact an average of

75  
People

people in their very first year through preaching, discipleship, evangelism, community service, and more.

Since our founding in 1998, we've equipped

15,000+  
Leaders

in hard places around the world.

Materials translated into

12  
Languages

which together give us access to over 2 billion people.

(Partial or complete translations in Hindi, Tamil, Telugu, Nepali, Bengali, English, Shona, Ukrainian, Russian, Hungarian, Spanish, and Portuguese)

# Vision for the Future

- Where is your organization headed over the long-term? (Strategic Plan)
- Relate the vision to the mission and goals.
- Show how your fundraising will help fulfill this vision.

# The ROAD AHEAD:

## BRIDGING THE GAP IN 2022

We are living in a desperate world, and church leaders are asking for our help. With the support of our partners, next year we hope to:

### EQUIP 2,022 LEADERS

in Subsaharan Africa, South Asia, Eastern Europe, Latin America, and the Caribbean.

Ultimately, we hope to impact the lives of more than 150,000 people through these trained leaders.

#### New Locations

We aim to revitalize and mobilize churches in strategic locations by offering our training in new places like Belarus, Slovakia, Bangladesh, Nepal, Sri Lanka, and more.

#### New Translations

In order to reach some of these new places, we need to translate our material into additional languages. In 2022, we hope to complete translations into Russian, Hungarian, Ndebele, and Portuguese.

#### New Global Leadership Gathering

Our global leaders are the backbone of our ministry. This year, we want to bring them to the U.S. to make big, bold plans for the future and to meet the people who support their work.

#### New Global Action Scholars in Residence

For some of our students, Global Action's training ignites a desire to go deeper in their study of Scripture. Since these students face significant financial obstacles, we want to begin providing a full scholarship for a talented young leaders from each region to go to Bible college in the Global South while serving in our program.

#### Continued Rapid Response to COVID-19

The pandemic continues to wreak havoc around the world, with each region being impacted differently. In 2022, we want to continue responding to the urgent needs arising from the pandemic through the mobilization of local churches and leaders in the hard places.

# DEEPLY ROOTED

## IN 2024

We love going new places and starting new initiatives, and we've done a lot of that in the last few years. But in 2024, our whole team senses a strong calling from God to go deep rather than wide. We want to strengthen our roots and focus on carrying out our mission with even greater excellence.

With the support of our partners, in 2024 we aim to:

### EQUIP 2,000 PASTORS AND MINISTRY LEADERS

in Subsaharan Africa, South Asia, Eastern Europe, Latin America, and the Caribbean.

- Complete the translation of our program into strategic languages, such as Arabic, Bengali, Portuguese, Russian, Hungarian, and Ndebele.
- Strengthen global teams and structures to facilitate future growth.
- Pursue several avenues of validation to enhance benefits to students and improve success metrics.
- Launch the Diaspora Seminary of North America to equip international leaders in our own neighborhoods.
- Award full-ride scholarships to at least two particularly promising students in our regions.



# Financial Needs

- Give total budget goals, not a “menu” of things to select from.
- Make sure approximate costs are accurate and complete.
- Always describe in programmatic, not operational terms.
- Airtight numbers.
- Show sustainability.
- Be ready with detailed, supplemental information, but don't lead with it.

# Gift Plan

- This will be based on what we understand about the prospects.
- List # of gifts needed at each level to reach goal.
- Three sections: top, middle, and low tiers.
- People can see where their gift fits into the larger goal and also that your ministry has a plan to reach its financial goal.

# BRIDGING THE GAPS *Together*

# DONORS	GIFT RANGE	APPROXIMATE TOTAL
1	\$100,000 - \$150,000	\$100,000 - \$150,000
1	\$75,000 - \$100,000	\$75,000 - \$100,000
2	\$50,000 - \$75,000	\$100,000 - \$150,000
6	\$25,000	\$150,000
12	\$10,000	\$120,000
15	\$5,000	\$75,000
25	\$2,500	\$62,500
MANY	MISC.	\$42,500
GIFTS TOTAL: \$725,000 - \$850,000		



## HELP US DEEPEN ROOTS IN 2024

# DONORS NEEDED	GIFT AMOUNT	TOTAL
1	\$150,000	\$150,000
1	\$100,000	\$100,000
1	\$75,000	\$75,000
4	\$50,000	\$200,000
7	\$25,000	\$175,000
12	\$10,000	\$120,000
15	\$5,000	\$75,000
20	\$2,500	\$50,000
MANY	MISC.	\$55,000

TOTAL NEEDED: \$1,000,000



# Leadership Profile

- List board, committee/s, key staff.
- Include contact information.
- Printed on the inside back cover or back cover.

# OUR LEADERSHIP

## U.S. TEAM

Dr. Rick Thompson  
President



Dr. F. Lionel Young III  
Executive Vice President



Dr. Elizabeth Marvel  
Academic Director



Rich Smith  
Chief Financial Officer



Bailey Bada  
Director of Partner Relations



## GLOBAL TEAM



Amit Mondal  
Director of South Asia



Buhe Mativenga  
Director of Africa



Dennis Ruano  
Director of Latin America



Igor Grishajev  
Director of Eastern Europe



Yuniel Cruz  
Director of the Caribbean

## BOARD OF DIRECTORS

Bob Smith, Chair  
General Counsel  
Paradise Valley, AZ

Steve DeWitt  
Senior Pastor  
Crown Point, IN

Dr. Nikki Green  
General Dentist  
Fort Worth, TX

J.W. Oliver  
Business Owner  
Argyle, TX

Dr. Rick Thompson  
Senior Pastor  
Edmond, OK

Scott Dickson  
Consultant  
Garland, TX

Paul Knier  
Mayor  
Big Lake, MN

Jeff Peterson  
Educator  
Roberts, MT

Brian Banks  
Business Owner  
Oklahoma City, OK

Barry Fluth  
Real Estate Developer  
Big Lake, MN

Tom MacAdam  
Consultant  
Colorado Springs, CO

J.P. Wilson  
Senior Pastor  
Gulf Shores, AL

# Overview #2

## The Four Stages of the Ask (or Invitation)

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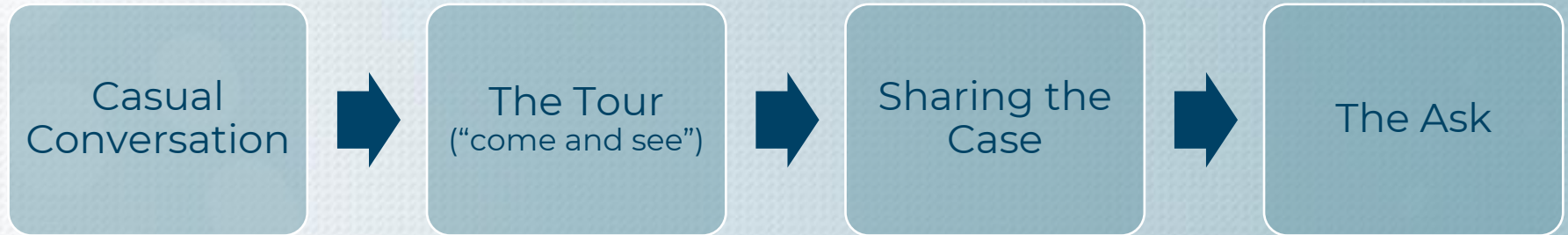


## Two Primary Rules When Cultivating Major Gift Donors

Always let them know ahead of time if you will be asking for a gift.

Ask for something they can say “yes” to.

# Four Stages of the Ask (or Invitation)



## Each Stage has FOUR STEPS:

1. The Invitation
2. Preparation
3. The Meeting
4. Follow Up



# Step One: The Invitation

Always remember the goal is *getting the appointment*:

- Use the donor's preferred method of communication
- Clarify the purpose of the meeting and the time needed
- Always invite the spouse to join

## Step Two: Preparation

### ***The Art:***

Who has the best relationship with them?

What are they passionate about in your organization?

What is the best context for the meeting?

### ***The Science:***

What have they given to you in the past?

What have they given to others?

What is going on in their life?

## Step Three: The Meeting

### Prepare for the meeting:

Re-read notes from previous meetings

Look for ways to authentically connect with the donor(s)

Plan out questions you are going to ask

Plan the question that you will ask at the end that leads to deeper involvement

Get comfortable using a tool like Flipsnack if the meeting will happen virtually



## Step Four: The Meeting

- Relax and clarify the donor's available time
- Remind them of the purpose of the meeting
- Enjoy the small talk for 50% of your time
- Transition to the point of the meeting

# When Asking – Three Ways to Ask for a Gift

A specific  
amount

10%

A Range

80%

Open-ended

10%

# The Ask

*If presenting the case or asking for a gift in your meeting:*

1. Use lots of animation with face - smile!
  - a. BE ENTHUSIASTIC!
2. Present the budget and pause for questions
3. Share the gift plan
4. Decide how to ask
  - a. Ask for a specific amount (10%)
  - b. Leave it open-ended (10%)
  - c. Suggest a gift range (gift plan) (80%)
5. Always keep the ball in your court!!

## HELP US DEEPEN ROOTS IN 2024

# DONORS NEEDED	GIFT AMOUNT	TOTAL
1	\$150,000	\$150,000
1	\$100,000	\$100,000
1	\$75,000	\$75,000
4	\$50,000	\$200,000
7	\$25,000	\$175,000
12	\$10,000	\$120,000
15	\$5,000	\$75,000
20	\$2,500	\$50,000
MANY	MISC.	\$55,000

TOTAL NEEDED: \$1,000,000



# Before Sharing a Case for Support

- Set the “target high” and “target low” for the prospect
- Prepare supplemental information based on the prospect’s interest
- Be familiar and well-versed in the content of the Case and your **comprehensive** budget needs
- Consider personal input; stories you can share
- Practice with someone

# Know Your Audience

Plan how you will use the case for each donor/couple:

- Use as a 'horizontal' tool to give an overview, for most donors who will want to hear the 'big picture'.
- Use as a 'vertical' tool to drill down to specifics, for donors who will want to hear more about certain aspects.

# In Person-Using the Case

- Sit beside the prospect and hold the case (but take 2 copies, one for you and one for the prospect)
- Draw attention to the cover and theme - what you hope to accomplish
- Go through the case giving your own paraphrase; don't read it.
- Be enthusiastic - excitement is contagious
- Invite questions and seek feedback – listen deeply.
- Before/after you share the budget page, STOP for Qs



# If You're Sharing Virtually

- Make sure it's loaded in the right format and presentable
- Be careful not to be too quick to flip the pages
- Make sure to send them a physical/hard copy of the case BEFORE or AFTER you present it to them.
- Practice using your presentation tool (for example, Flipsnack) before your video call.

# When a Donor Agrees to Make a Gift

- Follow up as you said you would
- Follow up with a note stating the commitment
- Use a letter of intent or commitment form
- Document the commitment now!
- Always thank them...multiple times
- Always keep “the ball in your court”

# Overview #3

## Prospect Management

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# CURRENT DONORS

*Make a commitment  
not to lose any current  
donors.*

# LAPSED DONORS

*Who has given to you  
significantly?  
Who has the capacity  
to give significantly?*

# Evaluating Prospects

## 3 Marks of a High-Impact Donor:

- ✓ Relationship: How are they connected to you?
- ✓ Capacity: How much can they give? What is their financial situation?
- ✓ Generosity: Are they 'givers'? Do they have a track record of being generous?

# Segmenting Prospects

## Strategic Focus for Annual Fundraising:

- Priority 1 - Top Prospects\* (High Affinity / High Capacity)
- Priority 2 - Difference Makers\* (Strong Affinity / Medium Capacity)
- Priority 3 - Helpers (Healthy Affinity / Low Capacity)
- Priority 4 - Future Potential (Low Affinity / High Future Capacity)

\* Annual Campaign Priorities



# Priority #1s

- They are accessible either directly or indirectly through a "connector".
- Many you will know well & all should be cultivated to build a closer relationship.
- Ability to give more than 3% of your fundraising goal annually.
- 10-15 people maximum in your list.

# Priority #2s

- They are accessible either directly or indirectly through a "connector."
- They have the ability to give .5% to 3% of your fundraising goal annually.
- Cultivation & solicitation will occur in person and over the phone

# Priority #3s

- They have limited financial ability, falling below .5% of what you need to raise annually.
- Once you discover that a prospect is a "3" you need to utilize a different strategy...



# Priority #4s

You think they could become a Priority 1 or 2 donor.

In some cases:

- You don't know them well and need help to reach them.
- You think they may have a special interest in your organization.

The goal here is to determine:

- the depth of interest in your organization
- how you might be able to work with them
- who is the best primary contact
- their giving potential and interest

# STRATEGY

"What is the smallest number of donors we can talk with to raise the largest amount of money?"



# STRATEGY

Two primary ways to ask

Individual



Group



*ASSIGN A STRATEGY TO  
EVERY PROSPECTIVE DONOR!*



# Individual Solicitation Approach

- Less efficient...but more effective
- Raise 80% or more from 20% or less of the donors (for an annual fund work towards 60/40)
- Use personal solicitation:
  - face-to-face, zoom, personal handwritten letters/telephone
- Ask for quarterly, semi-annual, or annual pledges

# Group Solicitation Approach

- More Efficient.... but Less Effective
- Large and Small Group/Event
- Letter/Telephone:
  - Letter includes gift request and mentions follow up phone call
- Follow-up telephone conversation

# PLAN

A written annual plan or calendar that includes all the activities related to asking and thanking donors.

- Summer - Update Case for Support
- August/September - Share Case & ask major donors
- October - Use Gala as a celebration & final 10-20%
- April/May - Engage, update & thank major donors



# Sample Annual Fundraising Plan

A	B	C	D	E	F
	Development Cmt/ Leadership Team Meetings & Communication	Fundraising Events	Engaging Priority 2 & 4 Prospects 1,	Fundraising Materials & Event Prep	Communication (Staff/Leadership, Donors, Volunteers)
Jan					
Feb					
Mar					
Apr					
May					
Jun					
Jul					
Aug					
Sep					
Oct					
Nov					
Dec					

# Thank you!

