



PROJECT RESOURCE

Day 3 | September 24, 2015
Denver, CO

Day 3

Thursday, September 24, 2015



7:30	Breakfast
8:00	Bishops' Suites Reports
8:30	Opening Meditation on the Rich Young Ruler
9:00	Major Gifts
10:00	Break
10:20	Major Gifts
11:30	Lunch and Major Gifts Diocesan Group Discussion
12:45	Table Reports
1:00	Philanthropist Panel
2:30	Break
3:00	Major Gifts continued
5:00	Bishops' Suites: How to Teach and Manage Major Gifts in your Diocese
7:00	Celebratory Dinner

Bishops' Suites Reports:

Day Two

Resource 3.1



Report: “Teaching Annual Giving Campaign excellence in our diocese as volunteer consultants”

Have a person from your diocesan team designated as ready to make your report (10 minutes) Not all dioceses will be called upon but all will be asked to be ready to be called upon to tell the larger plenary what you discussed and what plans you made for the roll—out of Project Resource in your diocese.

Discuss and develop plans for rolling out a consulting and teaching program in your diocese that improves annual pledge campaign planning, management and effective metrics evaluation.

1. How could your diocese plan, market and host stewardship and membership growth seminars either as a diocese or regionally within your diocese in order to annually provide materials teaching and encouragement in this work?
2. Do you know who, within your diocese, are the clergy and lay professionals who have expertise in financial development, teaching adults, training, consulting and the art of hosting meaningful conversation? Can you develop a leadership roster of these people and mobilize them to assist support services in your diocese regarding financial development and membership growth? Furthermore, would it be possible, one day, to have a church—wide speakers—bureau and consultants roster from which all churches and dioceses may draw talent for teaching Project Resource materials?
3. How will you roll—out a Project Resource training team to train your churches in effective financial development and membership growth?
4. How would you use the icons, Bible passages and prayers on the icon cards to spiritually and scripturally ground the conversations you have in churches regarding stewardship and membership growth as resident, free consultants?



Notes:



Icon: The Rich Young Ruler

Resource 3.2



Egg tempera on wood, written and designed specifically for Project Resource, Edinburg, Scotland, August, 2015

Commissioned the summer of 2015 by Charles LaFond, this icon of Jesus' encounter with the Rich Young Ruler (Mark 10:17–22) was developed and written by noted Scots iconographer Katherine Sanders. Wildflowers native to Colorado populate the ground at Jesus' feet, recalling our deliverance from bondage: "He brought you out of the land of Egypt, out of the house of slavery. He led you through the great and terrible wilderness, an arid wasteland with poisonous snakes and scorpions. He made water flow for you from flint rock." (Deut. 8:11–20).

The icon captures the moment Jesus ceases to look at the lavishly dressed young ruler and begins to see him ("Jesus, looking straight at him, warmed to him." —Mark 10:17–22).

17 As Jesus started on his way, a man ran up to him and fell on his knees before him. "Good teacher," he asked, "what must I do to inherit eternal life?" 18 "Why do you call me good?" Jesus answered. "No one is good—except God alone. 19 You know the commandments: 'You shall not murder, you shall not commit adultery, you shall not steal, you shall not give false testimony, you shall not defraud, honor your father and mother.'[a]" 20 "Teacher," he declared, "all these I have kept since I was a boy." 21 Jesus looked at him and loved him. "One thing you lack," he said. "Go, sell everything you have and give to the poor, and you will have treasure in heaven. Then come, follow me." 22 At this the man's face fell. He went away sad, because he had great wealth.

In this icon, Jesus is dressed in the standard red undergarment signifying His pre-created divinity, the cloak of blue symbolizing the humanity he puts on as Jesus. As with many depictions of Mary and the Beloved Disciple, the Rich Young Ruler is here shown enrobed in the humanity of blue/green, his cloak lined in red—a nod to his desire to be more like Jesus ("what must I do to inherit eternal life?" —v. 17).

Shown in arrested movement, Jesus seems annoyed. For his part, the Ruler is bent, humbly seeking answers, attentive to the "good teacher" but trapped in his wealth. The blue-green of his tunic resembles the color of the ocean near Edinburg, Scotland, where the iconographer lives. The gold background scenery suggests the window to divine connection that this or any icon offers.

This passage from Mark 10 is usually mistranslated. Once Jesus recovers from his exasperation, he softens because he sees the Young Ruler's desire to be helped: "Then Jesus, looking straight at him, warmed to him." Some versions are stronger, saying, "Jesus . . . loved him."

Raising money in the church means raising it especially from those who are rich—from people who have three meals each day, and much more besides. Raising money in the church means being compassionate with ourselves first (for being annoyed by wealth) and then being compassionate toward the rich, too, who are trying to make meaning of their lives, but need help—from us and from Jesus.

Financial development in faith-based institutions is a ministry. It is not a chore. Funding Christ's mission through the church is our responsibility in gratitude for all God has given us. To ask requires humility—more humility than is required by giving. Jesus, in this passage, learns an earthbound and human humility toward those trapped by their riches but yearning for God.

Major Gifts



Notes:

Introduction

Just as the body needs food, the soul needs meaning.

The meaning found in German concentration camps kept inmates alive. Meaning shapes human happiness. The ministry of midwifing major gifts is a ministry in which we help wealthy people to make meaning out of their lives and their money. We no longer tell them what we want them to fund. We now host meaningful conversations so that major donor prospects may come to see the overlap between what they want to happen in the world and what the church wants to happen in the world. Donors are trying to make meaning. Many very wealthy people are as unhappy as a human can become, simply because without meaning, the money is only security at best and isolation at worst.

In the second half of life, we begin to see a return to simplicity and an increased search for meaning. By mid-life, donors have been hurt enough or have hurt others enough to have had their hearts broken, and with that break, comes some measure of potential for new growth and meaning making. They begin to let go of things they fought so hard to attain, and as they do, they seek ways to make meaning of their lives. It is this meaning, and not building church-empires, that major gifts work is all about.

Like planned giving, which is a form of major gifts management (the last gifts), major gifts is not usually a campaign, but is rather a program. It is managed day in and day out in small increments, but measurable increments. Major gifts work in a diocese or a parish requires little more than a car, an index card with some top prospect names and contact info, a blank index card for notes after visits, a pen, some time (about a half day per visit -in town) and a phone. That is all you need. Computer programs which track how you interact with donor prospects is of value, but not essential.

The essential requirement of major gifts ministry is the willingness to set aside our anxieties about talking openly about money, and the willingness to schedule and make time to make personal visits. How do you know if you are doing good work in major gifts? If you have made three or more visits this week. Simple. You, your committee, your vestry, your Bishop can easily see if you are doing your job, by seeing the list of visits or phone calls you made this week to deepen relationships and seeing the outcomes. Just as easily, no matter what you say about your work, can they see if the job has not been done. As can you.

This work is wonderful work. In it we make friends, midwife longings and build the church.



Overview

1. The ministry of helping wealthy people to give their money away:
 - a. Providing care for the wealthy, their questions about their existence and their capacity to do good in the world.
 - b. Helping the donor to give their gift – an overlapping of circles (donor money and mission needs).
 - c. Raising money for mission- dual benefit – donor centered fundraising.
 - d. Our job is to connect the donor to the church in a way which is most meaningful to the donor.
2. Capacity and interest – leading the conversation of major gift cultivation and solicitation in a diocese and with churches.
3. Prospect versus suspect – the gardens and potholes of planning for major gifts management.
4. Defining a major gift in different settings:
 - a. Managing donor lists – who sees what and when?
 - i. How to keep the lists from mildew and dust in folders.
 - ii. Demystifying the process for a small church.
 - b. Moves management – how to move a key donor towards making a gift about which they are thrilled.

Notes:

Sample Moves Management Tracker

Resource 3.3

The meeting between the desires of the donor and the desires and needs of the church

Name	Cultivation 1	Cultivation 2	Cultivation 3	Cultivation 4	Cultivation 5	Cultivation 6	Ask	Follow-up
Smith, Joe	Dinner with Harry Walsh	Visit to the site of the new building	Lunch with the Rector at Rectory	Meeting with the architects to review plans	Meeting with donor of similar gift	Visit to similar church which has new building	Walsh, & Rector	Personal visit by Campaign Chair
Warrant, Harry and Julie								
Jones, William								

Sample Parish Wish-List

Resource 3.4



Air conditioning system: The parish church and buildings can reach ninety degrees in mid-summer without air conditioning. During the summer months, the old system is beginning to deteriorate, and it is necessary to provide a new heating and cooling system for the entire parish in order to maintain the building place meeting and worship.	\$45,000
Window Repair: The windows of the parish have been evaluated by Johnson and Sons and need some repair to both the glass and the lead in the two main windows over the altar and the west door of the church. Without these repairs water will leak, and the windows will become increasingly unstable.	\$18,000
Sound System: the church sound system is currently 27 years old, and it is in need of replacement. Sound is distorted past the fifth pew and is nearly inaudible after the 15th pew. This means that visitors who tend to sit at the back of the church for the first few visits are unable to hear.	\$13,000
Fenced Play Ground: As the church begins to attract young families, we need to have a secure, fenced area in which children can play. Plans have been developed and funds are needed to accomplish this goal.	\$9,000
New Church Plant: As the church begins to discern the possibility of a new church plant, a feasibility study will need to be accomplished in order to determine the best location and situation for a new church plant on the north side of the city.	\$27,000
Godly-play materials: As the number of young families increases in our parish, we have decided to establish a new godly play program and need new materials donated to make this possible.	\$15,000
New antiphonal organ: the original organ in the nave of the church was designed to be paired with an antiphonal organ over the west doors. These plans will produce the sound for which the original organ was designed and will assist in congregational singing.	\$300,000
Parishioner Emergency Assistance Program: the Parish is seeking major and planned gifts to fund a new assistance program for parishioners who lose jobs or who find medical expenses threatening their financial well-being.	\$2,000,000

Sample Follow-Up Letter to a Major Gift Ask

Resource 3.5

Date
Inside address

Dear (first names, female first):

Thank you for your consideration of an investment of philanthropy in the mission of Christ Church through expanding our staff to include the new Cathedral Missioner position. It was kind of you to listen to us when we visited. We are writing to ask if there is any more information you need as you discern this extraordinary and powerful gift of change and potential.

What we know is that what has focus, gets accomplished. We have accomplished great music, great liturgy, beautiful gardens and facilities, great pastoral care, and great philanthropy in our city through the ministries of Christ Church. This great work is happening because there are key people leading the charge in each of these target areas.

A target area we would like to lift up and fund is that of poverty engagement. This work will not only ease the suffering of the financially poor, but it will deepen the spirituality, establish the integrity and broaden the engagement of a congregation of people whose lives will benefit from being drawn into the care of and contact with the poor and marginalized. From feeding the city through a new garden, to organizing congregants who tutor the homeless, Christ Church is poised to engage the people with whom Jesus spent so much time and about whom Jesus spoke so passionately to the wealthy, privileged, established, and powerful.

While we reach out to other major donors about the antiphonal organ, the air conditioning, the gardens, the music ministry, and the vestments, we are asking past, recent, and present senior wardens to band together and take on the funding of this missioner position. We feel it will lead the congregation into a new phase of Jesus' call on our church and will, in the end, also build a case-for-support which will exponentially increase giving and service to the very humans Jesus so clearly called us to cherish; not because they need help, but because they will teach our church community who it can become.

Please let us know if there is any other information you need as you continue your planning and discernment, aware that we are and remain gratefully yours,

George Steinbrenner
Rector

Estelle Costanza
Lead Donor

Susan Ross
Lead Donor

Ruthie Cohen
Lead Donor

Different Levels of Major Gifts



1. Negotiating a diocesan and parish major gift with the donor:

- a. Diocesan Development
- b. The dangers of diocesan empire-building
- c. Dangerous pitfalls in cherry-picking
- d. Building Relationships
- e. Manipulation and the clerical, pastoral role
- f. Competition
- g. The gray area between major gifts and planned gifts
- h. Major gifts goal-setting
- i. Tracking major gifts moves and solicitations

2. Barriers to major gifts success:

- a. Leaders who do not plan the time for major gift cultivation moves and solicitations.
- b. IE: The payout is worth the time and trouble:
 - i. Call.
 - ii. Visit to introduce.
 - iii. Visit to follow up and listen.
 - iv. Visit to introduce icon leader of a program of interest.
 - v. Visit to follow up.
 - vi. Visit to ask if we may ask.
 - vii. Visit to demonstrate detailed, donor-driven case.
 - viii. Visit to make the ask.
 - 1. Over 3 years, 40 hours for a local donor (planning, materials, drive, visit and notes).
 - 2. Result: \$100,000.
 - 3. \$2,500 per hour spent.
- c. Leaders who do not have an awareness of the strategy to move a conversation and then go deep enough to make the ask.
- d. A lack of reporting-back or record-keeping – the rector or Bishop leave with all the data in their head, and not in a computer and in a way that can be searched, seen and used.

Notes:

What any church leader should know about major gifts management

Resource 3.6

1. Limiting beliefs (<http://thework.com/en/do-work>) will be the biggest hindrance to your major gifts work. If you decide, in your thoughts, that a donor will not give, then you will set up an internal barrier to your own moves to realize a gift. Let them tell you “no” but do not do that for them in advance.
2. Work with, know, memorize and think about your top 50 donors all the time. Keep a card with their names in your wallet or on your tablet, review that list when you have a few free moments in a line at the grocery store, and decide to make three new moves. Then set those moves into your calendar.
3. The hardest think about speaking to a member of your congregation or diocese is making that first call. It is a “cold” call in a way. And yet, not, because they have this wonderful relationship with their church and their God. You are just the midwife, so do not be afraid. Make the call.
4. Choose the right person to secure the gift, not just the easy person. A best friend might be right but not always. And never approach anyone who is married without also cultivating their spouse.
5. This work is based fully and entirely in the theology of the Holy Spirit. The Holy Spirit will nudge but needs your moves to collaborate with at every turn. In the end, the decision will be half spiritual and half emotional. It will be made in a flash of a moment but not until the flash comes. And it will happen because you have been able to “co-labor ate” of your joint enthusiasm (en – thusiasm – the breathing of the spirit) about the gift making the vision happen.
6. Listen to the needs of the donor. This is not about selling your church’s need. It is about linking the donor’s needs to give with your vision for making mission. So listen with active listening skills and often. Seriously. Shut up and listen! Deeply. Often. Thoroughly. So much that you can be sure you are connecting their longings to the institution and not just trying to win a gift.
7. The ask for a major gift is like building blocks. You begin with involvement and then with many small gifts. A massive gift is always preceded by smaller gifts and touch-points.
8. The best way to engage your donors is to involve them in significant leadership roles. A new development officer or Rector’s job is to assemble and form leadership on committees and commissions of influence in philanthropy generation. In a large church or diocese, you will be charged, by program-staff or clergy, of stealing the best people; but if you do not raise the money, there will not be programs! So take courage, and take the hit for the team! A church of 700 worshippers should have 140 top donors in leadership roles which support financial development or vision-casting. A church of 70 worshippers should have 14 top donors or influencers in leadership roles. Hire lay leadership for effectiveness, not charm.
9. Curate your volunteers well. Cultivate the careful attention to their advancement, step by step. Look at each name and ask, “How can I deepen their involvement in a way that connects with their natural passions?”
10. Staff leadership and the staff’s internal, moral character determines the vitality, growth and personality of the church or the diocese. People give to authenticity, humility and integrity. Only. Always.



11. The staff (Bishop, Rector, Canon, Associate Rector, Warden, Program Leader, etc.) is dominant in motivating the major gift – particularly the Bishop and Rector/Dean – personally. Make these relationships. It is always and only about relationships.
12. In order to win a major gift, the donor must be deeply connected to the church or diocese for which money is asked – the cause, not just the institution or the personalities leading it. The donor must feel that the planet needs what is being presented as the case.
13. Determine, with detailed strategy and careful discernment, who should make the call. Spend time on this. Strategy is not un-spiritual.
14. Never in American history has there been an era with greater urgency for the delivery of human and social services to the poor and marginalized. The church is in an amazing position to get great work done. Nor has there ever been an era of such great potential transfer of personal wealth in both major gifts and planned gifts.
15. Thank them seven times. Not seventy times seven – that's too much. But less than 7 is not enough. No one is ever upset by thanking or appreciation which is humble and sincere.
16. Try not to ask for a major gift over a meal. And never, ever rush the event. Build space into the visit. Get there early to be able to pray in your car. Go over the dialogue in your head. Make sure you have NOTHING scheduled the hour after the visit in case it takes some extra time.
17. Exciting and daring programs will inspire major gifts. If Jesus would recognize it as essential to the kind of mission about which he spoke, there is a good bet so too will the donor prospect.
18. No matter how exciting the program, donors are less likely to give to an institution with financial, gift-management or sexual/relational misconduct problems.
19. A compelling, driving, articulated belief in the organization is singularly important. An ask for a major gift needs to be clearly done in the context of a plan which all fits together. Be articulate about the strategic plan and be sure all stakeholders can articulate it.
20. Donors are making an investment as much as they are making a gift. They want to give to programs that create a significant change for good.
21. Never assume your major gifts prospects really understand the vision for which you are asking major gift support. Vision-casters will need to be very clear - great communicators of clear vision; or donors will not be able to understand the case, and the askers will not be able to clearly ask or develop the case with moves management conversations. It is not just the donors who need to understand the vision; the people around them must also. Everyone must be on the same page – this takes time.
22. Major donors like making challenge gifts. They prefer to invest in a larger philanthropy. They want their gifts to multiply the gifts of others. They like sharing the joy of giving by encouraging the giving of others.

What any church leader should know about major gifts management

Resource 3.6 (cont.)

23. Major donors invest in successful campaigns, just as major donors invest their money in successful companies when making stock purchase choices. It is the same act with different motivations and logistics. Plan slowly and carefully. Do not ever open and launch a campaign until you are absolutely sure that cultivation has secured the leadership gifts which will indicate and secure success.
24. Major gifts are almost certain to be repeated but only if your case becomes realized. If you raise major gifts for one case and build only part of it or change your case-midstream because you are responding in the moment to shifting donor interests, you will weaken trust in future gifts.
25. Major donors resist pressure, manipulation, fake charm, obsequiousness, bluster, non-profit empire-building and power-mongering. (So do minor donors...) The great thing about most donors and most church-goers is that they can sniff out inauthenticity in a moment of encounter. This is great news for authentic clergy and Bishops. This is very bad news for those whose authenticity is in question.
26. Campaign case is essential, but campaign literature can often be a turn off. Be clear, be attractive, tell a story. But do not be slick or fancy. Write and design your case materials with your donors in mind. And make sure the early case brochure for top donors is in flux – in a three-ring binder- and able to be changed and adapted to early indicators. The “brochure” is only for the final phase.
27. Take who you need to make the call. Only who you need. Take as few or as many as you need. But plan carefully.
28. Do not let a lack of research on your prospects limit your energy to encounter them.
29. The mission of the church, institution or diocese is of primary, overriding and paramount importance. And that mission needs to be clearly articulated and understood.
30. The “no” of youth and the “yes” of late-life are at play in giving major gifts. Gifts in life tend to be very conservative and conforming. Bequests are less conforming.
31. Bishops, clergy, and leaders must make the search for and identification of major donor prospects part of their daily and weekly routine or else they are not doing all of their job. Bishops, clergy, and leaders are always the Chief Development Officer. If you have a fundraiser on staff, then they are your assistant and motivator regardless of their title and work. Do not triangulate the development officer and staff if a campaign fails. It usually fails because the leader did not make the asks.
32. Ask for the gift.
33. Measure the moves and the asks made. What gets measured, gets done. Measure and track weekly.

Sample Call Report

Resource 3.7



Diocesan major gifts visit to Mrs. Anne Margaret Rockefeller

The Right Reverend John Smith Richmond, Virginia *DATE*

Visited Mrs. Rockefeller at her home in Williamsburg. This is the second visit. Mrs. Rockefeller invited me to call her Anne. Anne remembered our first visit and thanked me for the book on the history of the diocese as well as the bulletin photocopy mentioning her grandfather as senior warden in Saint Luke's, Washington DC as head of their capital campaign.

We had lemonade and she had made lavender shortbread, mentioning it to be her favorite and from her garden lavender. She asked about the diocese and thanked me for the last visit in which I asked her about her opinions of the diocese and of her parish church. She mentioned that she remembered fondly the Episcopal girl's camp in North Carolina to which she went in her teen years and noted how it had formed her. She asked if we had considered such a camp in our diocese or if I thought there was a need for one.

I discussed a hope for both a camp and conference center in the Blue Ridge Mountains outside Charlottesville, Virginia and noted that the clergy of that region were looking for property. Anne suggested that land would be expensive in that area and noted that her family has hunting land east of Fredericksburg. She asked if I would like to see the 200 acre parcel of land and noted that it was central to both southern Virginia and Northern Virginia. I said I would very much like to see it.

We set a date for October to meet for lunch in Fredericksburg to see the parcel of land. We will meet next *DATE* at noon at the Raleigh Club where she has a membership. Her husband will join us. I have written a note of thanks for the visit. Anne's husband John is CEO of Wilshire Industries and is a Presbyterian and does not attend services with his wife Anne. Anne mentioned her two children who live in Alexandria. Mary is a banker. Sarah is a State Senator's aide for Senator Johnson.

NOTE – file may be requested by donor – do not include anything you do not want the donor to see in the file. This material is for tracking moves but not for gossip.



FEARLESS TIP: For other material on major gifts, see *Fearless Church Fundraising*, Pages 160-175.

Major Gifts Diocesan Group Discussion

Resource 3.8



Discussion

1. How could you establish accountability for measurable outcomes regarding cultivation-moves-management and the major gift “asks” (in a parish, in a diocese, in a diocesan organization, etc.)? We do what gets measured. (This question will be repeated in the evening “Bishops’ Suites” conversation.)
2. What makes you nervous about asking for major gifts (defined, for now, as a gift equal to the amount of 5-10% or more of your annual budget)?
3. Describe a time in which you have procrastinated in approaching a major donor and why? How would you remove that as a barrier?
4. Describe a time in which you or someone you know asked for and received a major gift.
5. Describe a time in which your own feelings about wealth made it hard to connect with a major donor. How would you remove that as a barrier?

Major Gifts



Planning

Case development and feasibility studies – assessing worthiness of case and capacity/interest of donor prospects

Notes:

Sample Major Gifts Advisory Committee Job Description

Resource 3.9

The major Gifts Committee serves with the Chair of the Major Gifts Committee, Estelle Costanza, to oversee the process by which major gifts are requested and received for the mission of the cathedral.

The Major Gifts Committee will meet two to four times each year at meetings scheduled well in advance. The committee will review a list of 50-75 donors to the mission of Christ Church and will advise the Rector (Stewardship Officer, Canon Steward, etc.) as to what next steps might be wise as relationships are built with, and requests are made of, major donor prospects. The committee will also advise as to the process by which major donor “suspects” might be moved to “prospect” status and into deeper relationship with the cathedral.

Note: Prospects are donors with capacity and interest in the parish’s ministry and mission. Suspects are people affiliated with the church in some way who have capacity to make a major gift but lack the interest and/or involvement needed to incline such a gift.

Sample Major Gifts Leader Job Description

Resource 3.10



Sample Job Description for the Bishop, Rector, or Institution Leader of Major Gifts:

1. Plan your weekly schedule to include major gift calls.
2. Ask for major gifts.
3. Memorize the 50 top prospects names.
4. Keep current moves management list for all top donors in your wallet or on your tablet.
5. Require assistant to monitor your effectiveness in making visits.
6. Report to Standing Committee numbers and kinds of moves management and time taken for them.
7. Annually publish a report for your constituency in which you divide hours by amount raised to establish the value of your time spent in this way, annually. (Be aware that the first two years will show little progress but will enable considerable progress later.)

Sample Moves-Manager Job Description for Development Officer or Major Gifts Designee

Resource 3.11

1. Define the prospects.
2. Define and be able to articulate the case.
3. Develop a strategy for each prospect.
4. Plan moves.
5. Coordinate those involved in cultivation or the ask.
6. Be sure that measurable outcomes are set and managed for moves on a weekly basis.
7. Redefine the strategy as events, conversations, moves and realities unfold in real time. After each move, ask if the rest of the moves have shifted at all due to this move.

Major Gifts



Key to donor centered work:

Understand donors'

- Interests
- Needs
- Concerns
- Motivations

Matthew 27:55

"Many women were also there, looking on from a distance; they had followed Jesus from Galilee and had provided for him."

Church attendance – key leader to giving and pledging (see moves chart as reference)

Notes:

Prospect Research – A Summary

Resource 3.12

**Reprinted by permission of Lisa Bellamy
The Domestic and Foreign Missionary Society Development Office
2014 Fundraising Symposium: “Sacred Fundraising, Secular Tools” Prospect Research 101**

Getting Started: Basic Free Electronic Resources

When using electronic resources to understand more about an individual:

1. Stay focused on what you need to know. If you’ve developed a simple, effective database or spreadsheet, this will help you stay on course.
2. Follow an “egg timer” approach: give yourself a set amount of time.
3. Accept loss! Often, you will not find what you wanted to find via electronic resources. On the other hand, you will probably find some surprising, helpful information, at least some of the time. The following list represents free selected resources to help you get started if you want to learn more. Try to supplement your Google searches with other search engines such as:
4. Clusty <http://clusty.com/>
5. DuckDuckGo <https://duckduckgo.com/>
6. Million Short: <https://millionshort.com/> Million Short, when it works, can yield information that Google’s regular indexing does not pick up. To search Google effectively, go to: <https://support.google.com/websearch/answer/134479?hl=en>
7. You want relevant, accurate information about the right person.
8. Notice the sources in your results lists. For example, use Wikipedia with caution as the information can be self-reported, maliciously-entered or inflated. Professional researchers present only information from Wikipedia that they can confirm through other sources. LinkedIn information is also self-reported. A prominent figure can generate bias and vitriol from bloggers, and so forth.

University Prospect Research Bookmarks

Universities are at the forefront of prospect research and management. There are several prospect research resource lists but these three sites are excellent and can help you familiarize yourself with the categories of information available. They provide lists indexed by categories: biographical, business and employment, public records, real estate, philanthropic giving, and more. Some of the for-fee, subscription databases listed may be available via your public library (see below).

1. University of Southern California Development Research Site: <http://www.usc.edu/dept/source/>.
2. Stanford University Development Research <http://web.stanford.edu/dept/OOD/RESEARCH/>
3. Northwestern University Prospect Research bookmarks: <http://www.nudevelopment.com/research/bookmark.html> Public Library
4. Your library card! This is gold. Register on your public library website or meet with a librarian to discover what online database options are available to you either from your desktop or at the library.
5. Sample databases might include Proquest Historical Newspapers (family background), Hoover's (private company information) Zoominfo (aggregates information on individuals), Foundation Center or Guidestar (see below), Infotrac or Newsbank (news sources), and many more.
6. You might also have access to a university library's resources through alumni privileges.
7. Try Google searches on names by site type. Ex: "John Smith" site:edu or "John Smith" site:org. As Google help pages point out, searching a name several different ways yields the best results. Ex: "John J. Smith" or "John and Jane Smith," etc., will offer different results.
8. Google searches on names combined with terms such as "donor" or "philanthropy" or "gift" are also helpful.
9. Donor lists and annual reports often appear as PDF files. Another way to focus your search is to use Google Advanced Search to limit results to PDF files.
 - i. However, a general unlimited Google search on a name can yield a news article or press release about a major gift.

Philanthropic Database Sources

1. The Foundation Center: <http://www.foundationcenter.org/>. You can look online for a family foundation name with the "Find Funders" free search. In New York City, Atlanta, Cleveland, San Francisco, or Washington, DC, you can go to the Foundation Center and access the Foundation Directory and other databases for free. You can also access DonorSearch for free: <http://www.donorsearch.net/> This is a for-fee subscription database that provide an overview profile of an individual, including gifts to and associations with nonprofits. The information is not comprehensive or 100% confirmed—it is gleaned from Internet and public records information, which vary widely—but it can be useful.
2. Guidestar: <http://www.guidestar.org/>. If you know the prospect has a foundation you can read the IRS990-PF through Guidestar's free service. - Political Giving - Campaign contributions are a documented philanthropy indicator.

Prospect Research – A Summary

Resource 3.12 (cont.)

3. <http://www.opensecrets.org/>
4. <http://www.fec.gov/finance/disclosure/norindsea.shtml>

Additional Reading

1. Prospect Research for Fundraisers: The Essential Handbook, by Jennifer J. Filla and Helen E. Brown (John J. Wiley & Sons, Inc: 2013). Several prospect research books are available, but this is a good place to start.

Major Gifts



The Eight-Step Process

1. Identification
2. Qualification
3. Strategy
4. Relationship building
5. Request of the gift
6. Acknowledgment
7. Stewardship of the gift
8. Renewal

Notes:

Major Gifts

Notes:

Making the “Ask”

Making the actual “ask”, after many days, weeks, months or years of cultivating a relationship and discerning the donor’s interests, can be frightening or intimidating.

A gift solicitation should not be made until the donor is very clearly aware that you will be asking for a major gift. He or she should know the meeting is a meeting in which a request for a major gift will be discussed and there should have been so much previous contact, so many meetings, so many reviews of plans and editing of them by the donor that the “ask” will be to them somewhat of a relief.

The architecture of the visit and its details cannot be under-planned and must be planned in great detail. What follows is a discussion of those details and their related model documents.

1. Making “the ask” in a major gifts call
 - a. In the case of a diocesan ask: multi point case coordination between Bishop and clergy and donor.
 - b. The request for the visit.
 - c. The team who will ask.
 - d. The case materials.
 - e. The do’s and don’t of the situation, location, people, timing, hospitality, script and readiness with a leave-behind file.
 - f. The conversation content:
 - i. Scripting
 - ii. Rehearsal
 - iii. Plan the details
 - iv. Body language and roles in the ask
 - v. Silence after the ask – solicitation -team does not break silence
 - vi. What happens with a “yes”?
 - vii. What happens with a “no”?



2. Barriers to making a major gift from the donor's point of view

- a. That's a lot of money.
- b. I have a financial set-back.
- c. I have a financial commitment to fulfill.
- d. I am more interested in this other project.
- e. I am not wealthy.
- f. I will give, but not this much.
- g. I give to many causes, not just the church.
- h. You have not involved me along the way.
- i. I need to speak to my financial advisor.
- j. I need to think and pray about this. May I have some time?

3. How to tell when "no" means "not yet"

- a. The letter proposal
 - i. knowing when to use one.
 - ii. content.

Notes:

Nurturing Versus Selling: Checking Your Motivations as you Ask for Major Gifts

Resource 3.13

1. Are you seeking gifts or relationships?
2. Are you seeking an accomplishment or a relationship?
3. Is not-getting the gift right now, in this “ask” meeting, ‘a lose’ for you?
4. Are you making a pitch or are you hosting a conversation?
5. Are you trying to impose your will on the donor?
6. Do you ignore conflict, or do you work towards mutual solutions?
7. Whose interests are more important? The church’s or the donor’s?
8. Are you willing for the conversation to take a turn towards pastoral care and away from the gift?
9. Are you willing for the ask to become another in a line of moves-managed because the ask is too early?

Major Gifts



Other Major Gift Ask Issues

1. The ask when it turns to conflict.
2. Follow-up after the ask:
 - a. Getting the gift is not the end, it is a whole new beginning
3. Donor recognition
 - a. Plaques
 - b. Walls
 - c. Names
 - d. Announcements
 - e. Gifts
 - f. Articles
4. Asking for a gift on the telephone versus in person.
 - a. the “go-away” gift
 - b. the “not-yet” gift
5. Asking for gifts from the elderly or infirm.
6. A tour of some resources in this manual:
 - a. Top ten aspects
 - b. Prospect research
 - c. Sample capital gift chart
 - d. The eight-step process Exercise
 - e. Six things to remember in a small church
 - f. Sample capital calendar
 - g. Sample test for readiness- capital campaign

Notes:

How “the Ask” Meeting is Designed

Resource 3.14

1. Know your prospect very well.
2. Be absolutely sure you have done well and enough moves management.
3. Ask yourself one more time: “Are we asking too early?”
4. The solicitation should take about 20 minutes.
5. The introduction (2 minutes).
 - a. Why are you here?
 - b. What is your common ground?
6. The preliminary to the ask (8 minutes).
 - a. Review the case.
 - b. If the donor gets bored ask questions in which the donor states the case.
 - c. Ask if you have been understood.
7. The ask (2 minutes)
 - a. A specific amount is asked for and silence follows.
 - b. Conversation and negotiation (6 minutes).
8. The ending conversation (2 minutes)
 - a. Restate the case summary.
 - b. Restate the ask.
 - c. Restate the benefits of the gift (2-3).
 - d. Establish the next step.
 - e. Be able to deliver a gift proposal letter that restates all that has been said, especially if a spouse was not present.

The Top Ten Most Important Aspects of the Major Gifts Ask

Resource 3.15



1. **Do not ask too early:** By the time you ask for the major gift, the donor should be anxious in the hopes they will be asked for the gift. They will be tired of all the meetings and all the reviews of the project and its plans. They will be ready to act! They should be excited about making happen what the gift will make possible. The average major gift requires 5-8 physical encounters between the case-representatives and the donor prior to the ask. Be sure that the donor is passionate about the case and wants to see it realized.
2. **Begin with the top donor prospects** and move downward in the “ask” ratings list so that peer-donors are asking peer or near-peer-donor prospects for gifts. Rarely is a person ever asked for a gift by a person whose own capacity makes them not able to give that-sized gift.
3. **Be sure that a suspect has been re-identified and re-classified as a prospect.** This means that the above-mentioned cultivation (see #1) has occurred, and a decision by the leadership team has assured that the right cultivation has occurred to move the donor’s status from suspect to prospect status.
4. If the donor is in any way infirm of body or mind, **be sure that the family is cultivated** and is as excited as you need the donor to be about the project and ask only in the physical presence of the family. The gift from an infirm donor must be a family decision.
5. **Be sure that the request is worthy of the donor’s passion** and the amount being asked. Be sure that you deserve the money being asked for by being sure that what is being made possible by this gift is essential to the planet and the Kingdom of God on it.
6. **Do the math to determine how many prospects (not suspects) you have.** Add up how many visits need to be made, how long is needed for the travel, visit, rating and follow-up. And then calculate how many prospects you need to realize the gifts, aware that some “no” answers will move prospects down the rating pyramid..
7. Make sure that the cultivation process has **matched the donor with the right request:** donors motivate what they give to based on their interests. No longer does the church tell people what to give and to what they should give it. Today, donors decide and the church responds.
8. **Do not worry about asking for too much.** If you have built the relationship, then you will have built the friendship of the donor and you will have been able to size up the amount appropriate to the donor’s capacity.

9. **Make sure that the people who have been a part of the cultivation all along are involved in asking for the gift.** New, late additions may include top vision-makers. It is all about relationship.
10. **If the request is being made by a diocese or Bishop of a parishioner,** be sure that the parish' clergy and leadership are aware of the cultivation process and have approved the request. In this situation the whole parish and diocese must be well and carefully cultivated. Go back to number one (above) – do not ask too early. Everyone must understand and be passionate about the worthiness of the mission before an ask can be made.



FEARLESS TIP: For other material on capital campaign management, see *Fearless Church Fundraising*, Pages 183-187.

Sample Gift Chart

- Capital Development

Resource 3.16



Note: for pre-cultivated and engaged population for \$600,000

This chart assumes that the people being asked are:

1. Well-informed of the campaign and its vision.
2. Have been given the opportunity to be practically involved.
3. Have been personally walked through the building to be shown the needs.
4. Have been shown and even have made suggestions to the plans being funded.
5. Are being asked by the one person to whom they cannot say no.
6. Have the capacity as well as the interest to give the gift.
7. Are aware that the pledge is over three years.
8. Are aware that their gift is seen as a cornerstone gift.
9. Are aware that 95% of the money will come from 5% of the congregation.

Prospects	Pledges of	# Gifts Needed	Amount Raised	Total
3	\$60,000	1	\$60,000	\$60,000
12	\$30,000	4	\$120,000	\$180,000
12	\$15,000	4	\$60,000	\$240,000
60	\$6,000	20	\$120,000	\$360,000
120	\$3,000	40	\$120,000	\$480,000
Remainder	\$1,500	80	\$120,000	\$600,000

Major Gifts: The Eight-Step Process Exercise

Resource 3.17

EXERCISE: Choose a person from whom you would like to request a gift in three years. Develop a strategy based on this eight-step program which will get you from suspect to prospect over the three years. Use their first name only (or a fictitious name) and describe each step, and list people you need to help you and dates as a goal for measurable success in each step.

1. Identification.
2. Qualification.
3. Strategy.
4. Relationship building.
5. Request of the gift.
6. Acknowledgment.
7. Stewardship of the gift.
8. Renewal.

Major Gifts Exercise: Designing “the Ask” Visit

Resource 3.18



Write bullets which outline the ask you are going to make to a specific person for a specific ask.

(Use this for a role-play with critiques or with co-askers.)

The solicitation should take about 20 minutes.

1. The introduction (2 minutes)
 - a. Why are you here?
 - b. What is your common ground?
2. The preliminary to the ask (8 minutes)
 - a. Review the case.
 - b. If the donor gets bored, ask questions in which the donor states the case.
 - c. Ask if you have been understood.
3. The ask (2 minutes)
 - a. A specific amount is asked for and silence follows.
 - b. Conversation and negotiation (6 minutes) (imagine possible negative responses and how you would face them in conversation.)
4. The ending conversation (2 minutes)
 - a. Restate the case summary.
 - b. Restate the “ask.”
 - c. Restate the benefits of the gift (2-3 minutes).
 - d. Establish the next step.

Six Things to Remember When Considering a Capital Campaign¹...

Resource 3.19

1. The likelihood of successfully raising funds in a capital campaign is directly proportional to the amount of time given to creatively and meaningfully involving the church members in planning the project from brainstorming to final case² development.
2. Trying to shorten a process of planning, awareness raising and church community involvement will only weaken the foundation of the campaign and threaten its success.
3. In the 1980's 10% of the people gave 90% of the money for a capital campaign. Since the 1990's 5% of the people gave 95% of the money for a capital campaign. This means that the success of a capital campaign in a small church is dependent on identifying and involving and asking a pivotal group of about 5-20 people.
4. Generally, capital campaigns which succeed are campaigns in which the building or renovation projects are clearly designed to either improve the quality of the community life of the congregation, or provide for basic human need to the poor and the marginalized or both (IE: the case must be compelling). How is this capital improvement serving front-line mission?
5. Generally, in a campaign which is well-planned and given time for planning and involvement (1-3 years prior to the asking for pledges) and in which annual stewardship is well-managed, a capital campaign can raise 10 – 20 times the amount raised in annual pledge campaigns. Similarly donors to capital campaigns can pledge 10-20 times their annual pledge to be paid over 3-5 years. The relationship building that occurs in a capital campaign, if properly stewarded after the capital campaign, will grow the annual fund.
6. A well-planned capital campaign over the 1-3 years of pre-pledge planning will involve the following steps: imagining what is possible, current needs and community assessment, building use audit, a long range plan and defined vision, strong annual stewardship campaigns for 3 years, initial list of hopes (case draft), inclusion of congregants in case development, major gift planning and asking, congregation asks, celebration, acknowledgement and building management.

¹ A church with an average Sunday attendance of between 15 and 60 persons and an annual pledge budget of between \$30,000 and \$150,000.

² A "case" is the document which lays out what the money is being raised for and why the project(s) is/are important.

Sample Capital Campaign Planning Calendar - Macro View

Resource 3.20



This plan is only a model. It is assuming an annual budget of \$50,000 - \$100,000, financial and spiritual health in the parish, and a bold and compelling vision for ministry outside the church walls. This plan is a macro plan. Each step has 5-20 steps within it in its detailed version which is done in Steps 1 - 6.

Step	Month/Year	Task
1	January/1 (2 months)	Discernment: The Vestry begins discernment (prayer and reflection on God's call) about what God may be calling them to do in terms of Capital Development. Prayer and imagining take place individually and corporately.
2	March/1 (6 months)	Study: The Vestry begins an internal and external study to show what the parish is doing and what the area needs from the parish. Demographics and statistics are collected. Discernment continues.
3	October/1	Stewardship of Finances: Campaign gets very great attention. Systems and communications are improved. Every attempt to convert all families to pledging is made. The best preparation for a capital campaign is a strong annual campaign. Discernment continues.
4	December/1	Input: The parish is told what was discerned about a Capital Campaign and what results came from internal and external study of mission and demographics. The parish is asked to imagine what the capital campaign could accomplish and to report back. Discernment continues.
5	January/2	The Campaign Leadership is recruited and the Capital Campaign Initial Fact Sheet (see appendix V) is drafted and reviewed. A small "prospect review committee" of 3 - 4 people is recruited to consider who will be asked for major gifts. This work is essential and must be done with prayer.
6	March/2	A Capital Campaign Plan is developed with the Canon for Stewardship. The plan is reviewed by all those expected to be top givers to the campaign (gifts over \$10,000). Architectural design work is done. Campaign materials are drafted and reviewed. A calendar is developed.
7	March/2	Campaign Communications tools are developed. Drafts are discussed with all top donor prospects so as to get input and so as to involve top donors. This is a strategic phase. Remember that strategy is not unspiritual - Jesus was very strategic in how he managed his ministry.

8	April/2	Leadership Gifts Phase (8 weeks): Donors who are expected to give gifts over three years totaling more than \$10,000 are quietly asked by the right people for the right gift at the right time in the right way. Gifts are ideally recruited in order of size from highest to lowest so that as people make pledges, they can participate in the asking of the gifts of the next tier down. This phase is quiet and allows for privacy. The success of the campaign rests on Jesus, but our part of the success of a campaign rests on this phase.
9	June/2	Public Phase (4 weeks): All other gifts are asked for and a goal of 100% participation is sought from the congregation at large. This is usually done in teams. Five people per team, five pledges asked for per person. This must happen fast and be well-coordinated or it will fall prey to procrastination. Campaign communications is on-going with reports, brochures, status reports, flash reports, bulletin and newsletter announcements, etc.
10	July/2	Campaign Clean-up & Thank You / Recognition Phase. Stewardship of Finances campaign planning (which began quietly in May) steps up its work to be sure that the Stewardship of Finances campaign is not undermined by Capital Campaign energy. IMPORTANT!... If communications are done well, capital campaigns will only strengthen annual campaigns and increase giving.

Capital Campaign Test for Readiness

Resource 3.21

How This Works:

A score of 100 is the maximum a parish can score on this test for readiness. A score of 80 or higher indicates a very good chance for success. A score of 60 – 80 indicates a reasonable chance for success. A score of 40-60 would indicate that there are problems in management and vision which need to be addressed before moving forward to a capital campaign discernment or planning phase. A score of less than 40 indicates that a parish is not ready to even consider a capital campaign and must ready itself if the desire or calling seems to be there. Note that the first four total 60 points and if there is weakness in these areas, then planning for a campaign needs to be placed on hold until issues can be addressed.

Staffing: Is the clergy and lay staff ready for the demands of a capital campaign? Could schedules allow for 30% increases in work which comes from a capital campaign? Can the Rector, Vicar or Priest-in-charge devote 50% of their work time to the capital campaign?	Score 0-10
Vestry Leadership: Can the Vestry increase its level of financial and time commitment to the parish by 50% during the campaign? Is the Vestry a healthy vestry? (ie: Are there "parking-lot meetings," Does the Vestry pledge? Does the vestry pledge at least 1% of their income to the parish in the Stewardship of Finances campaign? Does the vestry have a routine of regular attendance and prayer? Has there been any financial or sexual scandal in the last 5 years?	Score 0-10
Leadership Gifts: Are there a top set of 10-20 prospects (not suspects=able but not willing) who are able and willing to give 40-60 percent of the campaign goal? Will the top gift provide for at least 10% of the goal? Will the second and third largest gifts each provide for 5% of the campaign goal?	Score 0-20
Planning: Is there a five – ten year written draft of a plan which is updated regularly and is steeped in prayer and discernment?	Score 0-5
Case-for-support: Has the clergy and vestry written down what the money would be raised for and why it is important that this money be given and that this building or renovation be done? Is the case mission-driven or simply empire-building? Would a parishioner, on reading this case say "Wow! Can we really do that? How wonderful? Jesus would love our doing this! This case really meets human need!"	Score 0-10
Study: Has study been done which indicates that demographic changes and needs assessments have been done? Is the parish just looking at what it wants or has the parish studied what the parish and the surrounding town or village or city needs? Has the parish considered its current building and its use? Has an audit of space use been done?	Score 0-5
Pledge Support: Does the parish engage the congregation in bold Stewardship programs? Is the Stewardship of Finances ministry strong? Is the vestry squeamish about asking for major gifts or is there a solid history of boldly asking for the pledges which are needed to fund a robust budget? Is there a willingness to differentiate between suspects (people who can give) and prospects (people who can give and will give)? Is there a culture of bounty rather than scarcity?	Score 0-10

Record-keeping: Is there a system in place to keep records of pledge giving? Is the Rector, Vicar or Priest-in-charge clear that they know what the congregation pledges as a function of both spiritual care and parish management responsibility? Will current functions allow for the increased record-keeping and gift management of a capital campaign?	Score 0-5
Communications: Is communications set up both to offer information to the parish and to receive information from the parish? Is there a regular newsletter which is easy to read and economically written? Does the communications speak AT people or with people? Is there money in the Capital Campaign Imaginations budget for the design and implementation of simple but attractively designed materials? Are internal communications well-managed? Does everyone know what is happening, why and in some measure of advance notice so that last-minute crisis is not a norm?	Score 0-10
Spiritual Depth: Is the parish fully engaged as a community? Is there an atmosphere of anticipation or of timidity? Is leadership well-disbursed so that many areas of leadership feel and are in fact empowered to use their creativity or is absolute power held by a clergy-person or a Warden? Is the parish thinking about capital development or is the parish praying about capital development? Do parishioners seem to enjoy each other? Is there a sense of call to comfort the discomforted and discomfort the comfortable, or is it the other way round?	Score 0-15
Total Score	

Bishops' Suites Discussions:

Day Three

Resource 3.22



Discussion:

The Diocesan design for teaching major gift identification, moves management, solicitation and program management (diocese, large church, small church)

1. How could you establish accountability for measurable outcomes regarding cultivation-moves-management and the major gift “asks” (in a parish, in a diocese, in a diocesan organization, etc.)? We do what gets measured. (Repeated from lunch conversation - an opportunity for more depth.)
2. How do we set up the teachers and the teaching in our dioceses regarding major gifts?
 - a. What training can we accomplish on major gifts in our diocese and how might we do that work over three years?
 - b. How can a diocesan staff encourage major gifts management in their diocesan churches and diocesan programs? Who is the diocesan facilitator/coordinator for major gifts?
 - c. How can we facilitate and coordinate a comprehensive “ask” of a major donor (parish, diocese, ...)



Notes:

