TAKING DONORS SERIOUSLY®

HANDBOOK

Taking Donors Seriously® ... so we can maximize the time for ministry to kids.

God has led you to be part of Young Life and to be involved in this mission committed to informing adolescents about God’s love for them. The overriding goal of this fundraising training program is to maximize ministry with kids while minimizing time and effort in fundraising.

The terrific attitude Young Life has about working with kids is exactly what’s needed when asking adults to give money. Young Life and the people involved in this exciting mission take kids seriously. Now it’s time to take adults seriously. We should be concerned about who they are, what they’re thinking, what they’re interested in, what they don’t like, and what they’re planning to do. Donors are not the means to ministry. They are an integral part of the ministry.

The fundamental purpose of Taking Donors Seriously is to bring “the big dream that everyone has a right to know Jesus Christ” to every community God is calling Young Life to serve. Our basic premise is that it takes 150 to 200 donors in a community who will support this ministry every year. This belief is demonstrated by Taking Donors Seriously over time, loving and working with them when they give ... and when they don’t.
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One of the great hallmarks of Young Life is the way we treat kids. We make it a priority in our ministry to communicate God’s love and appreciation for them. We do this by spending time with kids, by loving them unconditionally, and by clearly presenting the Good News.

In our ministry, we partner with adults, but sometimes that doesn’t feel like a partnership. Sometimes it feels like we are using donors and their resources to fund ministry instead of partnering with donors in ministry. Donors wonder why it is not a joy to support what they believe in so strongly. Ministry folks wear themselves out trying to wring from people what these friends would willingly give, if they knew the needs and felt they were a part of them.

I am excited that despite our failings in the past, we are committed to caring for our donors the way we care for kids. We want donors to experience God’s love and commitment as a part of their experience of teaming with us to reach kids in the community and around the world. We call it “Taking Donors Seriously” (TDS).

I hope you will use this handbook both to acquaint yourself and others in Taking Donors Seriously. Among other things, it will allow every committee member to find his or her particular niche — the work God has called them to carry out on the committee.

Thank you for joining with me and thousands of others to reach kids in middle schools and high schools across the United States and around the world.

President of Young Life
CHAPTER I
STARTING THE RIGHT WAY:
THE BIBLICAL PERSPECTIVE OF FUNDRAISING

The Bible actually has a lot to say about money. Specifically for us as fundraisers, Paul sets a bold, unashamed example of a person who is not afraid to ask others because he knows the Gospel of Jesus Christ is the most important priority he could ever give his life to. Take a moment and ask yourself this question: “What do I believe about fundraising?”

- Do you believe it is biblical?
- Do you believe it is a legitimate means of earning money?
- Do you truly believe God is our provider not the donor?
- Do you see fundraising as an invitation to trust God?
- Have you thought about the opportunities to build lasting relationships with donors through this process?
- Have you thought about giving as a spiritual opportunity for both you and the donor?
- Do you enjoy giving to others and the ministries they are involved in?
- Do you believe “a worker is worth his or her wages” (Luke 10:7 and 1 Timothy 5:18)?

Let’s take a look at what God’s Word says about raising money in order to be involved in the ministry and mission God has called us to.

1. **It is a biblical way to earn a living.** Take some time to study 2 Corinthians 8 and 9. You will see that Paul makes a great case for other people giving to the ministry and work he and his fellow workers are doing. He is not ashamed to ask for money (Philippians 4:10-20), in fact, he uses one church’s generosity (the Corinthians) as an example to encourage the church in Macedonia to give (1 Corinthians 9:1-5). Though Paul himself was a tent maker, (meaning he made tents to provide money for his ministry), he had no problem with others receiving financial gifts so that they could devote all their time to telling others the Good News (1 Corinthians 9).

2. **Fundraising helps us recognize what Scripture has already declared:** We are fully dependent on God for our every need. This is a particularly tough one for us in America. We were taught you can do anything if you try hard enough, if you put your mind to it, if you just work hard enough or study enough. This couldn’t be further from God’s Word. We need to get back to the centrality of God’s Word and remember that HE is our provider. It is not our efforts that make things happen, it is God alone and His grace working through us. Take a look at verses such as Genesis 22:8; Deuteronomy 8:2-3; 2 Chronicles 1:8-12; Psalm 23:1-3; Isaiah 43:20; Jonah 1:17, 4:6-8; Malachi 3:10; Matthew 6:31-34; Matthew 19:29-30; Mark 10:28-31; Luke 12:28-34; Romans 14:17-19; 2 Corinthians 9:8; Philippians 4:19-20; 1 Timothy 6:17. You will quickly see that God is more than able to provide for the needs of His children.
3. **Following TDS principles minimizes fundraising and allows Young Life staff to spend more time with kids.** When Young Life staff members don’t have another part-time job to distract them, they can devote their full attention to all the details involved in serving kids. In the Old Testament, the Levites were the tribe who dedicated their whole lives to serving in the temple. They did not own land; they did not work outside the temple, so all the other tribes were required to take care of them (Numbers 1:53; 18:20-21). In the New Testament, Paul asks the Corinthian church to financially take care of his workers (1 Corinthians 9:16-23).

4. **Fundraising invites others into the mission and vision of what God is doing.** In other words, giving is good for the giver. We all want to contribute to what God is doing in one way or another. We are the body of Christ (1 Corinthians 12, Romans 12, Ephesians 4). We each play a part, and not everyone can do what Young Life staff and volunteers do with kids. Donors love to be involved by giving money. It is one way to participate and is a godly response to all that God has given us. In 2 Corinthians 8, Paul makes a great cause for encouraging the people to be generous. Raising a budget is not only about getting a paycheck; it is seeing a vision fulfilled. Money should always follow our vision, and when people see what we believe God has in store for our communities, they will get excited and want to come on board in many ways, with finances being one of them.

God is giving us an opportunity to trust Him, grow in our faith, understand Scripture more fully, and live by faith not by sight. Will you accept the invitation to grow in your walk with Jesus and embrace the fullness of your role in reaching teenagers with the Good News? No true follower of Jesus ever said it would be easy, rather we aspire to Colossians 1:9-14 (TNIV):

> For this reason, since the day we heard about you, we have not stopped praying for you. We continually ask God to fill you with the knowledge of his will through all the wisdom and understanding that the Spirit gives, so that you may live a life worthy of the Lord and please him in every way: bearing fruit in every good work, growing in the knowledge of God, being strengthened with all power according to his glorious might so that you may have great endurance and patience, and giving joyful thanks to the Father, who has qualified you to share in the inheritance of his people in the kingdom of light. For he has rescued us from the dominion of darkness and brought us into the kingdom of the Son he loves, in whom we have redemption, the forgiveness of sins.
CHAPTER II
TDS IN 20 MINUTES

TDS stands for Taking Donors Seriously.
It is the official fund-raising philosophy for Young Life areas.

KEY ASSESSMENT QUESTIONS
• Who owns fundraising in the area?
• Is the vision and commitment for fundraising “relationship-based” or “event-based”? 
• Is there a TDS team in place?
• Is there a current Case Statement?
• Have the donors been put on a Priority Prospect List (PPL)? Are lapsed donors on the list?
• Are the top 30 percent receiving face-to-face visits and being asked for their gifts?
• Is there follow-up to the banquet designed to maximize donor retention?
• Is there a calendar in place that the area follows?

TDS NON-NEGOTIABLES (see Page 11)

1. Prayer
2. Case Statement
3. Leadership 
4. Priority Prospect List (PPL)
5. Cash Flow
6. Strategy
7. Financial Master Plan

TDS takes time to fully implement. It is not a quick fix for financial problems. Try to add a couple of elements a year, and in three years the area will be following a plan that retains donors and provides consistent support.

PRAYER (see Page 13)
• We not only recognize that it is within God’s power to fulfill all our needs, we also desire God’s wisdom and strength to carry out our responsibility in a way that ministers to all our donors. Do you have a prayer strategy in your area that includes donors?
THE CASE STATEMENT (see Page 16)
- Designed by the area director with input from the committee and TDS team. Update annually.
- Include the mission, vision, four C’s, committee, leaders, staff, and the budget.
- Create a multi-page professional case statement, not a brochure.
- Pictures of kids are essential.
- You must have a gift plan.
- Maps of the area are a nice touch.
- The easiest and quickest way to do this is to look at someone else’s model and copy it.

LEADERSHIP (see Page 20)

Area Director
- Prepares the case statement.
- Prepares the Online Cash Flow and PPL.
- Personally knows the top 10–12 donors in the area.
- Builds teams: TDS, banquet, golf, others.
- Coordinates communication of confidential donor information to TDS team.

TDS Chair
- Partners with the area director in the above.
- Holds face-to-face askers accountable for doing major donor visits.

Data/Finance Manager
- Maintains PPL.
- Prints out banquet invitation lists, phone-a-thon lists, face-to-face lists.
- Identifies lapsed donors.

TDS Askers
- Review lapsed donor list annually.
- Create and maintain relationships with major donors they win the right to ask.
- Make three to four major donor requests yearly.
- Brainstorm new names for PPL annually.

Young Life Committee
- “Owns” the banquet.
- Does major donor thank-you visits.
- Conducts the phone-a-thon.
PRIORITY PROSPECT LIST (PPL) *(see Page 22)*

Here’s a simple truth but a very powerful idea — if you want to take donors seriously, the first step is to write every donor’s name on a list and update that list each month — we call this list the Priority Prospect List (PPL). This simple task is critical to your success.

One of the fundamental purposes of the PPL is for a local committee to know the answers to these three key financial questions:

1. How much is committed in cash and pledges toward this year’s budget?
2. How much more needs to be raised?
3. Does the total TARGET HIGH amount equal or exceed by one-and-a-half times the amount needed to be raised, and does the total TARGET LOW amount at least equal the budget?

The answers to these questions will give the committee the confidence that comes from knowing precisely where the area stands financially. If more money needs to be raised, the PPL will tell them who to ask and how the money can be raised.

The PPL doesn’t raise money. However, it can be a confidence builder and a great road map for area health if it’s kept current.

CASH FLOW *(see Page 28)*

This is an interactive online tool that tracks and projects contributions and expenses. Young Life areas spend money fairly consistently, but often our contributions come in more sporadically. Young Life areas often have enough money committed, but their areas have fallen into deficit because of cash flow problems.

*The Online Cash Flow:*

- **Projects** your area budget 12 months into the future.
- **Shows** you how changes in revenue and expenses (either actual or projected) will affect your area’s bottom line.
- **Creates** a one-page summary of your area’s financial health following the familiar R&E format.

STRATEGY *(see Page 32)*

- The most effective way to raise money is to ask for it.
- There is a separate strategy for asking major donors for their gifts (face to face) than asking all non-major donors for their gifts (in groups).

*Individual Strategy:*

- Ideally, major donors should be about 30 percent of the donors, and their annual gifts should total about 70 percent of the budget.
• Each major donor should have a “point” person (primary caller) assigned to him or her who is responsible for the relationship.

• The area director should personally know the top 10–12 donors in the area.

• Once a year the point person needs to ask the major donor in a face-to-face meeting to renew his or her gift or increase it.

• Once a year the area should thank each major donor personally — anyone on the area committee can do this. There are long lists of creative thank-you ideas floating around — the key point isn’t which one of you does this, it’s that you do something.

• Once a year every major donor should be connected to the ministry in some way — by attending camp, club or an event like the banquet.

• Never ask major donors for their gifts at the banquet.

• Major donors often own a business. They are the best candidates to serve on the TDS team and lead in carrying out the individual strategy.

Group Strategy:

• All the other donors should be invited to the banquet annually (the area must have a system in place that guarantees all active donors are invited to the banquet).

• Timely follow-up with those who attend the banquet is essential.

• After the banquet wrap-up, there needs to be follow-up with those who have given in the past but have not yet given in this fiscal year.

• The best way to do follow-up is with a letter followed by a phone call through a phone-a-thon (see the Staff Resources Site for phone-a-thon guidelines).

• Follow-up = donor retention.

FINANCIAL MASTER PLAN (see Page 36)

• The Financial Master Plan is a fancy way to say “calendar.”

• You simply want to plot on a calendar what is going to happen when.

• The best time to raise money is when you don’t need it.

• When TDS is fully implemented and working, the area should have its budget raised in cash and pledges for the fiscal year by Dec. 31.

  October
  • Hold the banquet.
  • Mail banquet thank-you letters to all attendees.

  November
  • Mail year-end letters Thanksgiving week.
  • Organize a major donor thank-you effort for the first two weeks of December.
  • Do a banquet “Plus Delta” exercise.
  • Secure next year’s banquet date.
December
- Mail Christmas cards to donors.
- Deliver major donor thank-you gifts.
- Once you have your fiscal-year budget raised in pledges and gifts, turn your attention to saying “thanks” and earning the right to ask again next year.

January
- Mail/email winter newsletter.
- Finalize fall banquet leadership team.

February
- Mail phone-a-thon letter to all non-major donors who have not given or pledged this fiscal year.
- Conduct phone-a-thon.

March
- Brainstorm new names for the PPL.
- Review the lapsed donor list.
- Begin to solicit major donors (top 30 percent).

April
- Host spring campership fundraiser.
- Continue to solicit major donors.

May
- Update the case statement.
- Continue to solicit major donors.

June/July
- Mail/email summer newsletter.
- Send postcards from camp to donors.
- Continue to solicit major donors.

August
- Mail banquet invitations.
- Provide banquet instructions to table hosts.
- Meet with top 30 percent to procure gifts prior to banquet.

September
- Finish any outstanding major donor visits.
- Banquet hosts fill tables for the banquet.

Hints
- Invite every donor to the banquet — it is your showcase event. Major donors have already committed their pledges, so invite them to celebrate with you.
- Don’t expect the TDS askers and the Young Life committee members to be the same people.
- Great askers are already major donors, have a network of relationships in the community, believe in Young Life and control their own daily schedules.
- The best TDS askers are those who aren’t afraid of money.
The seven things every area committee must do if it is serious about raising money (referred to as non-negotiables).

1. **Prayer**
   We not only recognize that it’s within God’s power to supply all our needs, we also desire God’s wisdom and strength to carry out our responsibility in a way that ministers to all our donors.

2. **Case Statement**
   “Without a vision, the people perish,” and every local area needs a clear understanding of the needs of kids, Young Life’s mission and programs, and where they believe God is leading them.

   The case statement is best used by committee, staff and those asking for a gift. It’s a presentation tool, not a brochure to be read by donors and prospective donors. However, it’s a great foundation for preparing brochures and newsletters. It is a great way for the committee and staff to focus their ministry. It will guide the way they talk about their mission to donors.

   *The case statement is primarily for use in personal presentations to major donors.

3. **Leadership**
   Because “people give to people,” there is a direct relationship between leadership and prospects, especially in working with the 30 percent who have the potential to give 70 percent of the area budget. We also need leadership for small groups, the banquet, golf tournament and other events.

4. **Priority Prospect List**
   To take donors seriously, you have to know who they are. And to know who they are, you need to put them all on a list. Prioritizing prospects is about understanding who they are in terms of interest, financial ability and having the gift of giving. Assembling information on these three criteria enables us to prioritize our prospects, whether they are individuals, churches, foundations, or businesses.

5. **Cash Flow**
   While it is essential to have enough pledges to meet your budget needs — it is also essential to be sure that the donations come in before we need to spend the money. The Online Cash Flow allows Young Life areas to project their revenue and expenses for future months.
<table>
<thead>
<tr>
<th>THE PRINCIPLE</th>
<th>THE PRACTICE</th>
</tr>
</thead>
<tbody>
<tr>
<td>6. Strategy</td>
<td>Strategy boils down to the concepts of efficiency and effectiveness. Is the local committee effectively working its individual strategy in face-to-face meetings with the 30 percent and efficiently working its group strategy in meetings or events with the 70 percent? Strategy is working smarter not harder.</td>
</tr>
<tr>
<td>7. Financial Master Plan</td>
<td>Most committees have some kind of plan for fund-raising activities. These activities may not be connected to or be part of an overall strategy. This kind of plan is based on fund-raising needs rather than on the donors’ desires and abilities to give. We must begin with a strategy based on a Priority Prospect List that will bring prospects together with the case statement in the most effective and efficient way: individual meetings, small groups, banquets and events.</td>
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</tbody>
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**SECTION 1: PRAYER**

The first Young Life club occurred in 1939, in a little Texas town called Gainesville. But in reality, the foundation for the success of this club had begun six years earlier with a prayer meeting. In Rayburn’s own words:

> I found out that across the street from the high school a group of elderly women had been meeting for six years, every Monday morning, getting down on their knees in the living room of a dear old Mrs. Frasher. They prayed every Monday morning for six years, long before I ever heard of Gainesville, Texas, for the high school kids across the street. I was there a year before I heard of that prayer meeting. I used to go over there with those five or six old ladies and get down on my knees with them after that club started to roll. That was the thing the Lord used to start it. Back in seminary, a group of kids going to school there got interested in this club and started to pray. They’d meet every Monday night and pray while I went to the club meeting in Gainesville. It’s no wonder we had a revival in that school! “From Bondage to Liberty: Dance, Children, Dance,” by Jim Rayburn III, Page 36)

Prayer remains the most critical ingredient in the success of Young Life. As one of the “non-negotiables,” we must develop a strategy for prayer just as we do for other critical components of our work.

**THE PRINCIPLE**

1. **Develop a prayer strategy and include it in your area’s strategic plan.**

**THE PRACTICE**

- Young Life staff can develop their own strategy and meet weekly to pray.
  - **Hour of Power** — one region in Texas offers staff the opportunity to meet together for one hour every week. No food or conversation during this hour — only focused prayer for the ministry.
  - **Women who support the ministry financially** meet weekly or monthly for prayer and then brunch and fellowship.
  - **Men’s group** that meets before the work day begins.
  - **Couples** meet together in the evening.

2. **Build a prayer team.**

- Find adults in your area who are committed to and passionate about Christ, kids, prayer and the mission of Young Life.
- Encourage them often and communicate to them that their role is critical for the survival of the ministry in the area.

**Who should be on this team?** Whatever works for your area.
### THE PRINCIPLE  
**3. Schedule specific times and places for the entire year.**  

Like committee meetings, the group should determine the most convenient times and locations and be committed to attend. But be flexible as the Holy Spirit leads. A prayer team in Houston, Texas, was moved to meet across the street from a high school that did not have Young Life and pray for the students and staff. This was in a tough neighborhood where one of the committee members had been a teacher 10 years prior. The dropout rate at the school, the rising crime in the area, and escalating violence was heartbreaking, and they were convicted to pray. Consider a silent retreat with staff and committee.

### THE PRACTICE  
**4. Be deliberate.**  

Have a format for your time together. Determine who will be the leader or facilitator. Make this time all about prayer. Plan another time for fellowship and conversation.

**5. Report to the committee.**  

At every committee meeting, let them know that the prayer team is going strong. Encourage committee members to drop them a thank-you note once a month.

**6. Offer to pray with donors.**  

If this is within their comfort zones, pray with donors when you meet with them. Ask if there is anything you can pray about for them. Remember what their prayer requests were and follow up with them at your next meeting.

**7. What to pray for:**

- Wisdom and a clear sense of the direction for growth within the area.
- Kids in the schools.
- Young Life staff.
- Teachers, administrators and staff in the schools.
- Volunteer leaders.
- Committee.
- Club — recruit team to pray during the time club is in progress.
- Donors.
- Favor with people in the community.
- Financial health.
- Banquets.
- Camp.
Assign adults a specific time to pray during the week you take kids to camp so they are surrounded 24/7 with prayer.

- Give adults in your area the first name of one kid you are taking to camp and ask them to pray daily for this young person.
- Have wristbands made with the names of kids or the school you are taking to camp and distribute to committee and donors in your area to wear the week you are at camp.

- The mission and its leadership.
- Specific prayer requests that relate to staff or youth within the community.

THE PRINCIPLE

What to pray for (continued):

THE PRACTICE
SECTION 2: THE CASE STATEMENT

TAKING DONORS SERIOUSLY! WHERE DO I START?

The first step for any area committee in Taking Donors Seriously is to clearly state what Young Life means to them and what they believe it needs to be to the community. As a committee clarifies its mission, it takes the first and most important step in determining which individuals, churches, foundations, or businesses it wants to focus on.

The case statement is a written document that lays out the needs of kids and our mission to meet those needs. It presents what Young Life believes God wants to do in the lives of kids now and far into the future. It also reports on the impact the mission is having in the area and where the area is heading over the next three to five years.

The case statement then presents the financial needs for the area for the coming year. This may include a portion of money yet to be raised in the current year, in addition to other items outside the budget. Following the financial need page, there is a presentation of the financial plan to raise the money needed.

The last page includes all the players: volunteer leaders, staff and committee members, and the address and phone number of the local office. Some areas choose to list the schools where each of the leaders team together.

The case statement is more important for the person presenting the vision than for the person receiving the presentation. If there is clarity about Young Life’s role and mission in a given community, it will make a logical and compelling argument for Young Life as a local ministry.

As a clear case statement is developed, the committee can use it without the financial pages as a central resource document for how they think about the whole ministry. For example, in committee recruiting, committee members can use it to help prospective members understand Young Life more clearly. The same can be done as staff go out to recruit volunteer leaders. More importantly, the committee can keep it in front of them as a guide for how they go about planning, praying and carrying out the ministry. It should be revised every spring to reflect new growth and changes in the local ministry plan for the coming year.
In fundraising, the case statement will be used almost exclusively in situations where donors are being approached individually. In instances where an individual or couple have only a general interest in Young Life and are not inclined to look at the ministry in a specific way, it could be used very broadly as a presentation tool each year.

When an individual or couple knows Young Life well — in fact maybe knows it better than the person presenting it — the case statement should be used to focus on areas believed to hold the greatest interest to the donor. For example, if the donor has a lot of interest in planning and how Young Lifers think about the future, the focus should be mostly on the page that deals with the future vision. Supporting documents should be brought along to help this individual or couple understand the vision for the future in detail.

**COMPONENTS OF THE CASE STATEMENT**

Note the way each section connects together in a natural flow as our ministry unfolds in the case statement itself and later during the presentation. The Creative Services department at the Young Life Service Center has templates available to create case statements.

Creativity is encouraged, but care should be taken before rearranging or eliminating any of the component parts. Each component should be on a separate page. The recommended format has proven to be an excellent presentation tool.

**THEME/TITLE PAGE: A brief phrase to summarize your mission in your area.**

- The theme is best when it represents the practical application of the Young Life Mission Statement or case statement.
- It should be four to seven words long and be the most prominent part of the page.
- Start with a verb: use active language as you explain your area’s mission/goals.
- Give donors or prospects a slogan for remembering your bottom line.
- Include the fiscal year and the name of the area or region on the lower part of the page.

**NEED: The needs of kids you and your leaders are committed to reaching.**

Describe the needs graphically, preferably quoting local statistics that confirm young people are under worldly pressures. Remember the ultimate need we deal with is spiritual. This leads to why the ministry of Young Life is needed. In the presentation, this need and your involvement should be presented autobiographically by the staff or a committee person.

**MISSION: Young Life’s answer to the needs of kids.**

Clearly present Young Life’s mission in your case statement.
LIFETIME VALUES: What Young Life kids look like at age 50.

Young Life imparts to kids characteristics that last a lifetime. The product of our ministry is that people's lives are changed forever.

PROGRAM: Tools we use to accomplish our mission and develop lifetime values.

They are the five C's: contact work, club, camp, Campaigners, and committee.

ACCOMPLISHMENTS: The impact of our ministry on kids and our community.

Present evidence that the program is successful in having an impact on lives. Share testimonials of young people and list objective data demonstrating your accomplishments. Examples are the number of young people attending club, Campaigners, camp, and other activities. You may want to include the total number of kids being reached.

FUTURE: Direction of local ministry with kids.

State the direction you are headed and where God is leading your area. It should be done in broad strokes and include information that would interest a donor. Make this section exciting, but don't exaggerate. Relate why you are raising money now for the future, making it clear that by investing in the current program your donors are leading the way to fulfilling this vision.

Caution: Don't include a goal such as recruiting and training more volunteer leaders or increasing the size of your committee; these should always be part of what an area does.

FINANCIAL NEEDS: Operating budget for current fiscal year and all other desired needs to be met this year.

The heading should reflect the fiscal-year dates: Oct. 1, (year), through Sept. 30, (year).

Record the amount of money needed for each budget component and the total financial goal. List in broad terms (salaries, administrative, expenses, support services, office and vehicle expenses).

Since most key donors are experienced in reading financial statements, format your budget using good accounting practices (dollar signs, proper alignment, and identifying totals) and model a simple financial alignment.

FUNDING/GIFT PLAN: A summary of what our Priority Prospect List tells us.

This heading should include the fiscal-year dates: Oct. 1, (year), through Sept. 30, (year).
Based on your PPL, list the number of gifts needed and anticipated at each contribution level, starting with the highest amount. Include those donors you now have, plus those you hope to have based on your strategy, including gifts from churches, foundations and businesses.

For gifts above $100 per month, list in annual terms. At $100 per month and lesser categories, present as monthly gifts.

**PROFILE: The people — staff, leaders, committee — and schools where you minister.**

Basic facts about your area — who and where you serve, names of key players. Note your office address, telephone and fax number. It wouldn’t hurt to include Young Life’s IRS Tax Exempt I.D. #84-0385934.

You may want to include a list of the Young Life Board of Trustees. Make sure it is current.
SECTION 3: LEADERSHIP

The following section outlines practical steps for implementing a complete fundraising program in a local Young Life area. These are best practices that will ensure an effective fundraising solution for an area — IF followed to the letter. Shortcuts will shortchange your current and future fund-raising ability.

One bottom-line requirement is necessary to successfully carry out these recommendations: Leadership. There are different stages of fundraising and good leadership must exist at each stage.

STAGE 1
Preparing the case statement. It's best to have the area director write the first draft of the case statement because he or she serves at the center of the ministry. It should then be reviewed by the regional director, key committee people and the area TDS chair. Once a good draft is prepared, it should be submitted to the full committee for critique and final changes.

STAGE 2
Collecting background information. Committee members and the chair need to provide the necessary background information on the donors and prospective donors on the Priority Prospect List. In order to take donors seriously, it's critical to have basic information about each prospect to determine where each fits into the fund-raising strategy, as well as the appropriate range of giving to ask each to consider.

STAGE 3
Asking the prospects. Identify committee members and friends who will call individually on the key prospects.

STAGE 4
Running events and public relations. Capable, committed, get-it-done people are also needed to provide leadership for events and public relations. For example, for fund-raising events such as banquets and golf tournaments, it's critical to have small groups of volunteers who will plan and manage these events in relationship to the Priority Prospect List and the fund-raising strategy. It's also important to have volunteers write and distribute a newsletter and other communication pieces to keep donors and prospective donors apprised of the ongoing ministry.

In addition to the leadership described above, it's important to fill two critical roles: data/finance manager and TDS chair.
The **data/finance manager** keeps track of the finances, collects data from the team, and inputs it into the **Priority Prospect List (PPL)**. He or she makes sure every prospective donor resource is listed on the PPL and is evaluated in terms of priority level, target range of giving, and person/point of solicitation. A strong PPL will serve as an effective, dependable map in the fund-raising process. It’s impossible to devise a valid fund-raising strategy without a complete and accurate PPL, and without a reliable strategy it’s impossible to create a realistic and reliable plan. (See Appendix for Tools.)

The area must have a data/finance manager. Preferably this is not the area director but a volunteer, committee member or someone who wants to play an important role in helping the area raise its budget. (Note: A spreadsheet may be helpful. This is tedious work.)

There needs to be a **TDS chair** to oversee all of the TDS functions. His or her primary role is to keep everyone involved accountable for their assigned tasks and timelines. Often this person will be the committee chair or the data/finance manager, but it should not be restricted to these positions. There may be a need for a subcommittee TDS chair, co-chair or events manager to manage tasks such as face-to-face donor calls, small groups, letters, phone calls and banquet planning. The TDS chair must have a current accurate PPL to function effectively. The data should be in a form that will help manage each part of the strategy and enable the TDS chair to look ahead a week, two weeks or a month and see what needs to happen. The tools to do this with are the Online Cash Flow and PPL.

If the TDS chair role is not assumed by a volunteer, then the area director must not fill it. The committee chair should fill this role until a suitable TDS chair can be recruited and trained.

With a proficient data/finance manager using the Online Cash Flow and PPL and a committed TDS chair, an area will have a powerful duo who can utilize the talent of the area director and volunteers who want to succeed at fundraising through individual calls, small groups or events.

The chapters that follow describe what needs to be done. It’s the committee chair’s responsibility to recruit the most capable people to carry out these tasks. The work must be done by people who are gifted in their specific jobs and who have a list of people who have a proven history of giving.
SECTION 4: PRIORITY PROSPECT LIST

PHILOSOPHY

As you take donors seriously and use the PPL to write down the name of every donor, even those who may only give $10 a year, you’ll find that prospective donors begin to come to mind. These new ideas about donors only come when you sit down and do the discipline of the PPL and begin to take donors seriously.

Make it your highest priority to know which donors are interested in your cause and, among those, which ones God has blessed with resources and a desire to share them.

EVALUATING PROSPECTS

The Big Three

1. How is the prospect related to Young Life and/or a ministry to kids?

Every committee should launch an active search for people in the community who have a heart for ministry to kids. They should meet with these individuals to call them to love kids in their community for a lifetime.

2. What is the prospect’s financial situation?

When evaluating prospects financially, the focus should be on their ages and general circumstances and how an individual or a family earns their incomes. Try to develop a reasonable — even conservative — view of what they might be able and willing to give.

Individuals or families who own their own businesses tend to be the best prospects. There are sales and corporate people, as well as a variety of professionals and non-professionals, who have considerable incomes. Family incomes are even more significant when both spouses work.

In addition to income and circumstances (e.g., kids in college or illness), other considerations should be observed: lifestyle, memberships in clubs, positions on boards and, in some instances, public information on incomes and personal financial matters.

Generally, the evaluation of prospects should be undertaken by the TDS team and/or a small subgroup of the committee and should not be a process involving the whole committee. Evaluating prospects financially should be done in a general sense and not in a specific, investigative way.
If prospects have great interest in Young Life, and God has blessed them with financial ability, the question remains: Do they have a heart and desire for giving money away? Remember, the ability to give is in no way related to the desire to give. The widow Jesus talked about, who gave all she had, had very little ability but very high desire; the rich young ruler had great ability but very little desire.

As you evaluate the interest, financial situation and giving lifestyle of donors, you should use the following plan for prioritizing donors. This is the first step in building your fund-raising strategy.

PRIORITIZING PROSPECTS (Refers to future giving.)

Ones ........................................
- They are accessible and usually available for a meeting.
- They’re people we know well and cultivate to build a closer relationship.
- They have the ability to give $3,000 or more annually and/or:
  - They are giving substantially now.
  - We have reason to think that at some point they might put your cause fairly high on their giving list.
  - They are members of the 30 percent giving 70 percent of the budget.

Twos ...........................................
- They will be cultivated and solicited individually.
- They are accessible and usually available for meetings.
- They have the ability to give from $500 to $2,999 annually.
- Some may have the ability to give much more but:
  - They either aren’t givers, or
  - You have determined that you won’t be able to get very high on their giving lists.

Threes ........................................
- They will be cultivated and solicited in group settings including phone and personalized letter solicitations.
- Accessibility is not critical since most contact for fundraising will be via large group meetings, like banquets or letters followed by group phone calls.
- They have limited financial ability falling in the range below $500 annually.
These are individuals we don’t know well, particularly in a financial sense. But there is some basis for thinking that they have the potential and interest to become a Priority One or Two.

In some cases:
- You may know their financial ability, but need someone to help us reach them or help us through special circumstances.
- You may find they have a special interest in our mission and are accessible for this reason.

Try to make contact directly, or through someone, to determine:
- The depth of their interest in our mission.
- How you might be able to work with them.
- Who the best asker is.
- What their giving potential and interests are.

We know little about these prospects. They may be on our mailing list but are not active donors.

We have decided to place these prospects in a non-active status for whatever reason. They are better prospects than picking names from the phone book.

These are people who can or are helping us contact others but have modest giving potential themselves.

As you prioritize donors, you’ll also determine the asker and point of solicitation. Each year the committee should directly ask, in some way, every donor on the PPL to give. The prioritizing of prospects will define the actual circumstance in which donors are solicited.

**A very strong word of caution about prioritizing donors.** Think of them in terms of where they might be financially in the future, say, over the next two to three years. Don’t automatically prioritize them based on what they’re giving this year or have given in recent years.

The whole idea of a fund-raising strategy is to identify who the key donors will be. These are the people who can give financial leadership. The crucial question is: “Who are the prospects who could make up the 30 percent of donors who give a large percentage, say 70 percent, of your financial needs?”

Most donors are now giving what they will be giving in the near future. There are, however, some donors who are giving very nominally today, who have potential to give much more, but they have not had contact work and you haven’t won the right to ask them for a larger gift. Someone could be giving $100 this year, but be prioritized as One because of his or her potential. You need to see this individual as being part of your leadership strategy in fundraising. Over the coming months and years, intentionally work to draw her or him closer to the mission and a financial leadership role.

On the other hand, someone may be giving $1,500 a year and remain at that level for years to come. This is a wonderful gift, and this particular prospect should be prioritized as a Two.
### PRIORITY PROSPECT LIST

Here’s the information to assist you in the use of the PPL:

<table>
<thead>
<tr>
<th>PRIORITY NUMBER</th>
<th>Refers to the level at which a donor can give — not what he or she is currently giving.</th>
</tr>
</thead>
<tbody>
<tr>
<td>NAME</td>
<td>Name of the individual, family, church, or foundation.</td>
</tr>
<tr>
<td>PRIMARY CALLER</td>
<td>This is the person who assumes responsibility for making and maintaining the relationship with the donor.</td>
</tr>
<tr>
<td>STRATEGY</td>
<td>The point at which the solicitation for a contribution will be made, (e.g., a banquet, letter, phone call, or some other group approach).</td>
</tr>
<tr>
<td>TARGET LOW</td>
<td>Amount contributed last year is normally considered to be a target low for this fiscal year. This also can be thought of as what you are 90 percent sure they would give if properly asked.</td>
</tr>
<tr>
<td>TARGET HIGH</td>
<td>Maximum that could be expected this fiscal year; usually the highest amount the area is willing to ask for.</td>
</tr>
<tr>
<td>ASKED FOR</td>
<td>Amount the prospect was asked to contribute or is considering giving (money not yet committed).</td>
</tr>
<tr>
<td>COMMITTED</td>
<td>This is the amount of money either explicitly committed or strongly implied to the point where there is a high degree of confidence that it will be received (what has been given in recent years).</td>
</tr>
<tr>
<td>GIFT FREQUENCY</td>
<td>This is how the donor gives: monthly, quarterly, annually.</td>
</tr>
</tbody>
</table>
The numbers in the TARGET HIGH, ASKED FOR and COMMITTED columns are “in motion.” They move (from left to right) and may change until they reach the COMMITTED column. For instance, when you ask for a certain amount, it should be recorded in the ASKED FOR column and immediately the amount shown in the TARGET HIGH and TARGET LOW columns should be deleted. When the donor commits, the amount should be shown in the COMMITTED column and, simultaneously, the amount in the ASKED FOR column should be deleted. Normally, for each donor, there will be only one active dollar amount in one of these three columns.

However, a donor may commit to a specific amount and indicate that there is a strong possibility that an additional amount will be given before the end of the fiscal year. In such a case, enter the amount that was firmly committed in the COMMITTED column and the “strong possibility” amount in the ASKED FOR column. Later in the year, this ASKED FOR amount will move to the COMMITTED column or be deleted entirely, depending upon the donor’s decision. If these numbers are posted manually, the deletions can be accomplished by crossing out the amounts, thereby leaving a clear record of the actual changes from start to finish.

NEXT CONTACT/ FOLLOW-UP STEPS

Information to track the execution of strategy regarding calls and follow-up.
SUMMARIZING THE PPL

After entering what maximum amount is hoped for and anticipated for each person/entry on the PPL (TARGET HIGH/LOW), the total TARGET HIGH should be a maximum of one-and-a-half times your total financial need (budget) and the total TARGET LOW should at least equal your financial needs.

The three moving columns can be totaled at any time, which will paint a picture of where you stand financially in your strategic plan. The TARGET HIGH/ASKED FOR total serves as an indication of the total potential that remains uncommitted. It, too, should be a minimum of one-and-a-half times the NEED TO RAISE amount at any given time. (In the case of a new area, the multiple should be two times.) If the TARGET HIGH/ASKED FOR amount is not one-and-a-half times the NEED TO RAISE amount, then it’s necessary to plan immediately what steps will be taken to keep the area or region financially viable for the entire fiscal year. You may need more donors.

Your numbers should always be conservative, so don’t arbitrarily adjust numbers upward just to make them fit the above goals. When the potential and committed numbers meet the established parameters, the task that remains is to follow through with finalizing commitments and then monitor the progress of payments during the year.
Section 5: Current Cash Flow Projection

The Online Cash Flow projection is a critical tool when it comes to managing revenue and expense entities that operate year-to-year on an annual budget. Young Life is measured on whether it is in surplus or deficit, not whether it has a “correct PPL.” A Young Life Cash Flow was created to help you project your ending balance rather than react to what a past monthly statement says. It’s important to make your Cash Flow as realistic as possible. It is of no benefit to add numbers that are not realistic. If anything, you want to be very conservative when entering in numbers. The Cash Flow shows you four years of history, the current year, and two future years. This affords you the opportunity to look at past trends of revenue and expenses, and allows you to make accurate projections in the future. You can view other fiscal years in your Cash Flow by choosing from the “Select Fiscal Year to Display” drop-down menu. It automatically takes information from Giving and from the Trial Balance and puts it into your Online Cash Flow.

1. Next Fiscal Year’s Cash Flow

Enter your budget into the Budget Projection column on the expense portion of the Cash Flow (if this is not done by Oct 15, it will be overridden by the budget that has been submitted). It will automatically divide everything out by 12 over the fiscal year. Under Operating Revenue, enter your projected revenue (monthly, one-time, banquet, other) in the column for each month. Underneath Contributions, click the “Add Another Split Row” button and add in any other fundraisers that are unique to your area.

2. Monthly Updating of Current Fiscal Year Cash Flow

a. Break out Actual Revenue (when the month is closed). When the month closes, your income is automatically put into the “Contributions — Other Gifts” row. You will need to zero out that row (when that row is zeroed out, a new row titled “Unassigned Amount” will appear). Now, break that amount down into Monthly Donors (a monthly donor is defined as someone who gives the same amount over three consecutive months) and enter in the “One-Time Gifts,” as well as “Banquet,” “Golf,” and other rows. Once you’ve done this, the “Unassigned Amount” row will disappear, showing that you’ve balanced the contributions.
b. **Monthly Donors.** Who are your monthly donors; how many are there; how much are they committed to give every month? If you used “Giving History View” in the PPL, you can get this number by simply adding up all the monthly donor amounts. Bottom line, it is time to start tracking and monitoring who your monthly donors are and how much they give.

i. **One-Time Gifts.** Go back and insert any one-time gifts that were given. A suggestion is to leave this row for larger one-time gifts ($500+).

ii. **Other Gifts.** We all have those random gifts that happen from time to time. Use this row to input smaller, unexpected, non-monthly donor gifts. You can also use the “View Details or Add Notes” feature to indicate who it came from.

iii. **RTD Gifts.** Here is where the road diverges for many of your areas. Some areas have one staff person; others have an area director and a staff associate; others have multi-staffed areas with each person having individual fundraising goals and objectives. All of the white rows are changeable, so you can use these to track each staff member’s personal fundraising.

iv. **Event Income.** Rows are available (add Another Split Row) for you to change for your area’s specific income strategies and events.

v. **Other Income.** Be sure to account for any non-contribution revenue or internal transfers. (Use the “View Details or Add Notes” icon to indicate where the money came from.)

c. **Update Projected Revenue.** For future projected months, you need to update any fundraisers, monthly gifts, and one-time gifts to make them as realistic as possible. Any one-time gift over $1,000 should include a note about the source of the gift. You can add this note by clicking the “View Details or Add Notes” icon to the right of the gift. Put revenue from events in the month that the revenue will come in instead of spreading this amount out over the course of the fiscal year.

3. **Other Important Tips**

a. **Take time now to organize your expenses to fit reality.** Take note to put expenses for banquet or golf in the actual months you will be spending that money. (For example, if you have a banquet that is going to cost $2,400 in April, put that full amount in April under banquet and erase the $200 a month projection your budget would have shown.) The idea is to create the Cash Flow to mirror your actual expenses for months past and accurately project what future months will look like.

b. **Make it REAL.** Take time to adjust for reality. You may have budgeted to spend $1,000 a month on program or budgeted to hire a staff person whom you did not hire. Adjust your future expenses to account for any changes. Not doing so will throw off your projections and will not give you the accurate projection needed. If the opposite is true and you have hired someone or spent more, adjust for this as well for all remaining months.

c. **Wrap it up.** You should now have a Cash Flow Projection that 1) mirrors your actual activity through the most current month, and 2) realistically and conservatively accounts for your remaining months in the fiscal year, giving you a very close estimate of where you will end each month.
CHECK LIST FOR AN EFFECTIVE CASH FLOW PROJECTION

1. For the historical months, the numbers in the expenses should mirror your actual activity.
2. For the historical income, it should be broken into the respective categories. This means you will have to take the time to figure out how many and how much your monthly donors gave. You will need to enter the one-time gifts and break out how much came in from any events.
3. For the projected monthly expenses, you now can adjust for reality. Meaning, if you are spending less on program or did not hire a staff person yet, your “budget” is still showing this. Make the change so that your projections come as close as possible to what you will actually spend. This is key to getting an accurate projection to the ending balance.
4. On income projections, you can use a combination of several things to get a conservative, but accurate, income projection. You can use your PPL. Based on what people have committed to give, you can take those commitments and input the money in the months you “think” it will be given. You can base this guesstimate on when the money was given last year or when a donor said the money would be given. This is where the Cash Flow gets fairly fluid. You should be updating these projections regularly because things always change. You can also base your projections on history. If your monthly donations have been averaging $2,500 a month, it is fair to project that for the year.
5. It is important to update the Cash Flow at the close of each month. Look for a mirror of past actual months as well as an accurate, realistic look at the future. Just inputting the total of what was given last year in the future months is an easy approach, but it’s not a very helpful way to complete it. Please take the time to break down the income. It will help you, your committee and your supervisor to see your strategy and plan.

“NEXT YEAR’S” CASH FLOW PROJECTION

Here is how this process and hard work will change the paradigm of your area and how you raise money:

1. Begin using the next fiscal year’s Cash Flow as soon as you get your budgets. For years, Young Life areas have raced to turn in their budgets in September without any real planning or projecting on the income side. Just because your area raised money last year or you “think” you can raise a certain amount does not mean you actually can. This is simply not good stewardship. Think about a whole new approach to how you build your budget and how it is approved.
2. By building a “rough draft” budget in late spring and entering your income projections for the next fiscal year, you can begin the buy-in process from the committee and the commitment process from donors prior to the fiscal year even beginning. You would not set a personal budget in your own home without first knowing how much income you have coming in, would you? Of course, there is a level of faith involved — that is a given. But to start spending money without doing your part is irresponsible and puts both your paycheck and the health of your area at risk.
3. By the time you hand in your finalized budget, you should have an accurate picture of where, when and how the income for that budget will come. This way you are raising your budget and getting commitments through the summer and fall. Having your budget raised in cash and pledges by Dec. 31 becomes a reality.

4. Plan for growth. The other exciting result of running your area like this is that you are able to start projecting and dreaming for growth. Plus, you can involve your committee and donors in this process. You can now say, “Based on conservative estimates, we are $15,000 away from raising our budget for the next fiscal year, and if we were to hire an intern for XYZ school, it would cost an additional $40,000.” Now you can design a funding campaign to cover your operating budget plus raise all the money for growth before you even hire. This is financial health and the way we should be growing in Young Life.

CASH FLOW PROJECTION SUMMARY: WHAT YOU CAN DO NOW

1. Committee engagement — something to give them — now they get it.
2. Proper long-term planning.
3. Act now on what will happen later versus reacting now to what just happened.
4. Budget process can look much different.
IT'S VERY COMMON IN FUNDRAISING TO USE THE TERMS “STRATEGY” AND “PLAN” INTERCHANGEABLY. IN TAKING DONORS SERIOUSLY, THESE TERMS HAVE VERY DIFFERENT AND DISTINCT MEANINGS.

Strategy, in TDS, is used to put wheels on the overall goal of minimizing fundraising so you can spend the maximum time and energy working with kids and leaders. Strategy is determining where a committee should put its time to most effectively and efficiently achieve a desired result.

To execute a strategy, follow the 70/30 rule as a guide; it’s critical that you get clear on sound fundraising principles and concepts. They'll guide you in how you work with your donors. The two ideas that come into play in thinking about the how-tos of fundraising are effectiveness and efficiency.

Those who have been successful at fundraising agree that the most effective way to raise money is to go to people personally and ask them for commitments. Young Life agrees. However, this is very inefficient in terms of the time it would take to see every donor on your PPL.

The most efficient way to raise money is to approach people as a group and ask everyone to make a commitment to support your area. While more efficient, this approach is less effective because in any group there will be a range of interest, ability and inclination to give. As a result, those who have exceptional ability will tend to give more modestly than they are able. And those of modest ability will typically give at the same level they would give if they were asked individually.

The 70/30 rule and the concepts of effectiveness and efficiency go hand in hand. You should use your time effectively meeting and soliciting the 30 percent of your prospects who can give 70 percent of your support. With this scenario, you’re using 70 percent of your time to work individually with 30 percent of our donors to raise 70 percent of your money. Then you spend 30 percent of your time, through the use of group approaches, in an efficient fashion raising 30 percent of your money — that’s the strategy.

Now you need to come back to the primary TDS challenge of finding 150 to 200 donors in your communities and asking them to stand with your ministry to kids year-in and year-out for their lifetimes, or at least as long as they live in the area. By broadening your base and asking less of your major donors, you can begin to build stability and predictability. Then when you want to add staff, create new programs or have a special initiative, you can go to your major donors whom you haven’t tapped out and ask them for a special gift or pledge to develop your area.
With these general ideas in place, let’s make a concrete application. The TDS team and/or area committee has five ways they can raise money:

1. Face to face with individuals
2. Small groups
3. Large groups
4. Letters, followed by phone calls
5. Events

Going to individuals or organizations, such as foundations, churches and businesses, and meeting with them personally, only applies to the first way to raise money — face to face. The other four approaches fall in the category of group processes. Although there are five ways to raise money, your committee doesn’t have to use them all. The strategies for areas across the world will have many similarities. However, if we take donors seriously, each area will employ a variety of strategies tailored to their donors rather than one rigid, mandated, missionwide strategy.

The bottom line in strategy is making sure that you go about fundraising in a focused and fruitful way. It’s possible that, even with a well-developed, comprehensive PPL, you could still lose your focus. The PPL needs a strategy so the area committee can work both effectively and efficiently and know who is in charge to make sure each strategy is implemented.

Every strategy also needs a deeply drilled PPL and Cash Flow. The strategy could be very misleading if the PPL is inadequate. The PPL and strategy must be in sync.

**STRATEGY APPLIED TO PROSPECTS**

I. INDIVIDUAL SOLICITATION

A. Type

1. Individuals – Place of meeting usually set by donor.
   a. Breakfast or luncheon meeting – Normally allow an hour (most donors prefer).
   b. Donor’s place of business – allow 30-45 minutes (very effective).
   c. Donor’s home (normally least effective).
   d. Dinner meeting – OK, only if you know that the donor would be receptive.
2. Churches – See (9) below.
4. Business/Professional firms – see (10) below.
5. Foundations – see (10) below.
B. Approach

1. Raise 70 percent or more from 30 percent or less of the donors.
2. Use personal solicitation – face to face, personal letters, phone calls.
3. Ask for annual or multi-year pledges.
4. Staff should focus on 12 to 15 families/individuals or churches/groups. In addition, two to four TDS members/key committee members/volunteers should focus on another 20 to 25 major donors.
5. Work closely with three of these major donors in discipling them in your vision for ministry and encourage them to vicariously lead with you. These three should have the potential to give at least one-third of your budget. This is a benchmark, not an expectation.
6. Commit a minimum of three years to making this strategy fluid.
7. Remember, the ultimate goal is to minimize time in fundraising and maximize time in ministry.
8. The strategy dictates whom you should spend time with and care for over an extended period.
9. Churches – In contacting churches, use the back-door approach. Look for a person who is influential in the church to assist you in making contact with the right committee or person(s) involved in giving. It’s important that this individual introduce you and express his or her support for Young Life. After your presentation, it’s best to have your contact person propose to the church how much he or she would like to see contributed and when. Don’t appoint one person to contact all churches for contributions. Have one committee person agree to seek out the key contacts in churches who have the influence to assist in funding efforts.
10. Foundations and Businesses – Again, use the back door approach. Find the right person to do the asking. The Service Center Development department can help you with research on foundations to help determine likely prospects.

II. GROUP SOLICITATION

A. Type

1. Individuals (in group settings)
2. Churches
3. Christian Organizations
4. Businesses/Professional Firms
B. Approach
1. Raise 30 percent or more of the goal from 70 percent or more of your donors.
2. Use banquets, letters followed by phone calls, small group settings, and events.
3. Ask for annual pledges, expressed in monthly amounts.
4. On average, assemble more than 100 families/individuals/churches/groups.
SECTION 7: THE FINANCIAL MASTER PLAN

The Financial Master Plan (FMP) simply involves scheduling on a calendar what’s been formulated in the previous five steps: the case statement, leadership, PPL, Cash Flow and strategy.

Certain steps in the FMP, such as revising the case statement for a new fiscal year, or the date of the banquet, will be fixed dates. Other aspects of the FMP, such as committee meetings, cultivating Ones and Fours, and carrying out the letter/phone call step, will be parts of the plan that will change over the year. The FMP will be revised as the strategy is revised, based upon revisions in the PPL.

Remember: The strategy, based upon the prospect list, will provide all the elements of the FMP. The plan is simply a calendar that identifies when each aspect of the strategy will take place during the year.

FINANCIAL MASTER PLAN
(for fiscal year starting in Oct. 1, 20__)

This fund-raising calendar sets a goal to have funds committed (pledges/cash) by Oct. 1 (the beginning of the fiscal year), not by Sept. 30 (the end of the fiscal year)!

THE FUND-RAISING PLAN WILL VARY FOR EACH AREA. THIS IS AN EXAMPLE ONLY.

OCTOBER
- Annual fund-raising banquet (plan to raise the last 30 percent of budget).
- Meet with Priority One donors to thank them for supporting the area.
- Confirm and/or revise pledges for year not yet fulfilled.
- Letter from staff to everyone on PPL with update on ministry.

NOVEMBER
- Meet with and cultivate Priority Four donors who attended the banquet and explore their interest in giving prior to Dec. 31.
- Letter/Phone follow-up for Priority Two and three donors who didn’t attend the banquet, or who attended but didn’t make a commitment.
- Meet with Priority One donors not available in October to thank them for supporting the area.
- Year-end campaign letter (donors should receive by the Monday after Thanksgiving).
- Holiday newsletter.* See note on Page 37.

“It is very important to have a plan and to follow that plan. Saying thank you is very significant when it comes to people being connected and supporting Young Life. Our staff schedules time each week to personally write thank-you notes to our donors. Our Financial Master Plan also tells us when to send out our newsletters, thank-you notes from kids at camp, year-end appeal, banquet, golf event, and when our TDS team meets every month. It's the blueprint we follow.”

– Stacey Beal, Greater Puyallup Valley
DECEMBER
- Have Campaigners kids call key donors they know to thank them for making Young Life a reality and wish them a Merry Christmas.
- Send Christmas cards.

JANUARY
- Small group breakfast.
- Winter newsletter/eNewsletter.*

FEBRUARY
- Meet with all Priority One donors to bring them up to date on ministry prior to spring solicitation.
- Meet with all Priority Four prospects to get to know them better for a possible spring solicitation.
- Letter from staff to all on PPL with update on ministry.

MARCH
- Pizza sale.
- Spring newsletter/eNewsletter.*

APRIL
- Prepare case statement for next fiscal year and train new staff.
- Celebration reception for all supporters to pray for the start of the summer camping season.
- Letter from staff to all on PPL with update on ministry.

MAY
- Begin soliciting Priority One and Priority Four prospects for new fiscal year.
- Summer newsletter/eNewsletter.*

JUNE
- Golf tournament.

JULY
- Ongoing training for staff.
- Letter from staff to all on PPL with update on summer camping.
- Notes from summer campers.

AUGUST
- List those to be solicited at the fall banquet. Review with banquet committee to identify prospective hosts.

SEPTEMBER
- Wrap up any Priority One and/or Priority Four calls not made over the summer.
- Fall newsletter.*
- Have 80 percent or more of next year’s budget raised.

*Newsletters: Quarterly is best, but no more than six issues per year. Pictures and names of kids, leaders and committee members are always of interest. Add a letter from the area director about what he or she is thinking and doing. Don’t depend solely on either regular mail or email newsletters. Make sure you have a balance.
This form has been designed to incorporate both the strategy and plan concepts. The top part of the form is where tasks and events should be listed by month. (In Excel, these cells can be expanded to accommodate entries of various lengths.)

The greatest value of this planning form is to use the “Solicitations” and “Commitments” sections to project solicitations and commitments and then record the “Actuals” as solicitations are completed and commitments are made. Using these sections will help every area apply the discipline to raise their budgets. For examples of the Financial Master Plan, go to the Field Development website (staff.younglife.org/fielddevelopment) and select Financial Master Plan from the Tools dropdown menu.
CHAPTER IV
THE ASKING PROCESS

In most fundraising training, the emphasis is on how to ask for money. In TDS we don’t concentrate so much on how to solicit as we do on identifying who we ought to ask and how we relate to the donor after we have asked. Fundamentally, we’re asking donors to be part of a ministry to kids for their lifetime, or at least as long as they live in the local area where Young Life is ministering. We care more about relating the ministry to people over time than about a single solicitation.

Here are the two most important principles:
1. Always let them know ahead of time when you’re planning to ask (permission-based asking).
2. Ask them for something they can give.

The point of these two principles is that we’re not going to surprise people with a request for funds and catch them off guard. We’re not going to threaten them by asking for a financial commitment that may be beyond their means. We put our care for people ahead of our need for money.

Applying TDS in order to support Young Life means looking for people who have some connection to kids and/or a person involved in Young Life. We’re not asking strangers or uninterested people.

TDS means not meeting with donors when we’re under financial pressure, but going to them before we need their money to meet our financial needs. This way a “no” is easier to hear and deal with. When you’re raising money before you need it and they say no, you’ll feel freer to talk to them about their ongoing interest and when a good time might be to get back to them.

Call on donors in twos. There are many reasons for going out in twos, but the most fundamental is to have four ears listening rather than two. Even during a half-hour meeting over lunch, there’s a great deal shared. Two of you will remember twice as much.

Visiting as a pair when asking for a financial commitment is vital. The asker is held accountable to ask in the way that was planned. Stating a financial commitment to two, especially when a large commitment is made, has more accountability and is more public than expressing it to a single individual.
There are two roles to be played. A Young Life friend (who may or may not be a committee member) will be more effective in setting up a call with key donors than a staff person. But staff will be more effective in talking about the ministry than the friend or committee member. There is also an implied importance to a meeting when two meet with a prospective donor rather than one. Donors will be impressed when a peer, business associate or friend takes the time to come with the staff member, knowing that his or her presence means it’s an important matter.

There are four steps in asking for money:
1. The Invitation
2. The Preparation
3. The Solicitation
4. The Follow-up

I. THE INVITATION: THE MOST IMPORTANT STEP

This is the most important step because you will base it upon your PPL. It will fit what we know about the donor, and we will have the best person calling. It should include letting people know that the meeting — individual or large or small group — is for the purpose of talking about the ministry of Young Life and soliciting a gift. You will not be inviting an individual or a couple to an individual meeting if, based on what you know about them, the best environment to ask them to give is in a large group setting like a banquet.

Here are four things to keep in mind when inviting someone, or a couple, to meet one-on-one:

A. The individual asking for the meeting is the key factor in getting the appointment and setting the stage. Always delegate up to the most influential person, never down to just any willing person.

B. Be up-front about why you want to meet but avoid getting into any details of the meeting.

C. Making the phone call and setting the appointment:
The key to raising the maximum amount from your prospects is meeting face to face with your Priority One prospects. You have to be sharp when you call them. If you can get them to meet with you, more than half of the job is done and your chances of getting a pledge are high.

Here are some tips that come from successful campaigns. Study this material closely and maybe role-play these scenarios among your area team.

1. Call your best prospects first.
   “Best” is defined as someone you know well or know to some degree and/or who has had an interest over the years in Young Life or ministry to kids. After your first call, the others will come easier. If you have more than one prospect fitting the description of best, then call the best prospect with the greatest financial resources first.
2. After the small talk.
   - Ask to meet for 30 to 45 minutes to give an update on Young Life and invite his or her financial support. Immediately suggest two times during the coming two weeks when you’d like to meet, noting you’d be happy to come whenever it’s convenient. Once the appointment is set, it’s optional to suggest the prospect bring his or her spouse.
   - Always keep in mind the reason for the phone call is to set a time to meet. Be sure not to start the meeting (over the phone) unintentionally by an elaborate explanation of why you want to meet or a query about their interest in Young Life.
   - Always be up-front when asking to meet to talk about financial support. If you’re going to ask for support, say so. If you want to have a cultivation meeting first and ask later, say so.

D. Some prospects will agree to meet without much explanation, but many will not be enthusiastic about getting together to talk about making a financial commitment. Here are some of the most common challenges you’ll face:

1. **Challenge:** The prospect says this is not a good time and it won’t be possible to give now.
   **Response:** Tell him or her you understand. But don’t stop at this point. Explain that you would like to meet now so that in the future when the time is better he or she will know about our ministry and vision.

   The critical point is not to stress the fund-raising aspects but to emphasize the importance of ministry to middle school and high school kids. Your enthusiasm at this point means the difference between a “yes” and a “no.” If you convey anxiety about having the meeting, the message will come across that you’re more anxious about raising money than excited about your ministry and the important opportunity this ministry offers donors.

   Immediately refer again to the prospective dates for a meeting.

2. **Challenge:** The prospect begins asking a number of questions.
   **Response:** Try to defer him or her by saying, “I’d like very much to get into that and that’s one of the reasons I’d like to meet.”

   Immediately refer again to the prospective dates for a meeting.

3. **Challenge:** The prospect asks you directly if the meeting is for fundraising.
   **Response:** Be just as direct and say, “Yes, but we’re first of all committed to making friends for our ministry because we know that as people understand the importance of our work with kids, the support will follow.”

   Immediately refer again to the prospective dates for a meeting.
4. **Challenge:** The prospect demurs saying, “I know a lot about Christian ministries and I’m up-to-date on yours, so you don’t need to take the time to meet with me. I’ll send something in the mail.”

**Response:** Thank the prospect for expressing concern about your time and effort and/or his or her willingness to lend support. But stress that a great deal of thought and effort has been put into presenting your ministry with kids, so you’d appreciate the chance to share the full story.

Immediately refer again to the prospective dates for a meeting.

5. **Challenge:** The prospect puts off making a decision on when to meet.

**Response:** Be sure to suggest that you’ll call in a day or two to arrange for a time. Don’t ask him or her to call you.

6. **Challenge:** The prospect asks to discuss Young Life on the phone.

**Response:** Gently, but firmly, ask for the opportunity to sit down and take him or her through the case statement. Emphasize that you’re excited about your ministry and really look forward to sitting down with him or her to share the goals and future of your work. Try to convey how important a meeting of this nature is and that you need a special time when you can meet personally.

Immediately refer again to the prospective dates for a meeting.

7. **Challenge:** The prospect insists, “It would be a waste of your time because I won’t be making a gift.”

**Response:** Assure him or her that you understand. Quickly follow up by saying that you still would like to meet, regardless, because “... the bottom line for me is having good friends in the community who will be willing to speak up for us and say a good word whenever there’s an opportunity.”

Immediately refer again to the prospective dates for a meeting.

**II. THE PREPARATION**

A. **Before the Meeting:**

1. Develop a positive, enthusiastic attitude based on your commitment to kids and to achieving the goals of your development plan.

2. Carefully consider your financial commitment to Young Life and make your own pledge.
3. Be completely versed and articulate with your case statement.

4. Pull together information on the prospect including conversations with appropriate contacts. Complete a “Donor Format File” form. Data = Expectation. The higher your financial expectations, the more data you should attempt to collect.

5. If making the call with a partner, review in detail with him or her how you will approach the prospective donor and what you will ask the prospect to do. In your preparation, anticipate points of concern and resistance — always have a best-case and worst-case scenario.

6. Be sure to have multiple copies of the case statement, commitment cards, return envelopes and all the details regarding where you’re meeting. Get a phone number where you can call if you’re unexpectedly delayed.

7. Relax and be yourself.

8. Arrive on time!

B. During the Meeting:

1. Relax and take your time.

2. Take as much time as is available for small talk including special news of interest about Young Life.

3. When you’re ready to review the case statement with the prospect, sit next to him or her and hold the case statement booklet rather than handing it to the prospect. Mention that you’ll leave the booklet so he or she can read the material in more detail later.

4. Take a moment to draw the prospect’s attention to the case statement’s cover, noting the theme and time frame.

5. Clearly state that you want to take him or her through the booklet. At the end, ask for a financial commitment.

6. Go through the booklet giving your own paraphrase of the case statement — don’t read it!

7. EXPRESS YOUR ENTHUSIASM ALL THE WAY THROUGH!

8. Present the number of individuals and churches that are already committed and pledging to this important ministry, including the total amount committed compared with the total needed. Also put those figures in percentages.

9. After presenting the development plan or budget, STOP. Ask for questions on anything you’ve covered to this point.

10. Only after you have responded to the questions move to the solicitation.
III. THE SOLICITATION

When it comes to soliciting, there are two levels to consider. These levels are based on whether or not the solicitation is done individually or in a group setting.

A. Individual Solicitation

1. Present a predetermined gift plan.

2. Always present the gift plan first in installment terms, then in total dollar amounts.
   
   For example, you might say, “In coming to you today, we’re asking you to consider giving $100 a month for the next 12 months. This would be a total gift of $1,200. Would that be possible?”

3. If a question is raised about pledging, point out that it helps the donor maximize his or her support over what might be possible in a one-time gift. Also mention that pledging serves as a planning tool for him or her as a donor as well as for Young Life.

4. Be open and natural, relax and be your enthusiastic self!

5. When a pledge is promised and the appropriate thank yous have been given, fill out the commitment card for the donor and then hand it to him or her for a signature.

B. Group Solicitation

When soliciting either a small or large group, ask for the amount that the least able person or couple in attendance can give. By suggesting a gift level that the least financially capable people in the group can handle, we are taking an approach that helps us take every donor seriously and honors small gifts.

1. Small Group

   When an area committee is using a small group process and taking four or five couples or business friends to breakfast or lunch, invite individuals or couples of comparable financial ability. This will make it possible to ask for $100 a month with everyone in the small group having the ability to give at that level.

   If there’s a donor closely related to others in the small group who has much greater financial ability, this individual should be met with one-on-one before the small group and asked to make a commitment based on his or her interest and ability. The fact that this individual, or somebody else in the small group, has already given should be acknowledged so that they will be thanked in that small group setting and not feel compelled to make another commitment.

2. Large Group

   When preparing to ask a large group to support Young Life, center on a couple of gift levels that would encourage people to give generously while still being gifts that they would be able to give. It’s acceptable not only to talk about a monthly commitment, but to give one or two levels above that. The key principle here is to be bold and encourage people to give generously based on what that would mean for them.
The solicitation at the banquet might go something like this:

“Tonight, as each one of you thinks about supporting Young Life, we would like you to consider your support as a vote for the kids in our community.”

“We ask that each of you consider committing $25 a month beginning this month and through the following year. Possibly some of you could give more than $25 a month, say $50, or even $100 or more a month, beginning now and continuing through the year.”

Next, provide them with details on filling out their commitment cards and making their contributions. Finish by thanking them for their commitments.

IV. THE FOLLOW-UP: THE SECOND MOST IMPORTANT STEP

In TDS we follow up to encourage a commitment, even if it means helping a donor say no. As we review our PPL faithfully each month, we’ll be reminded of how to follow up. The TDS chair will make sure that the appropriate people do the follow-up. Here are some recommendations regarding follow-up, whether a gift is made or not:

A. If the prospect indicated he or she needed time to decide on his or her gift, then follow up with a call or visit as agreed upon. If the situation requires a new strategy, such as another meeting with a spouse or business associate, plan the new approach accordingly.

B. Effective follow-up helps the prospect make a decision regarding the requested commitment or gift. While the hope is always that he or she will say “yes” to a generous commitment, sometimes it will mean helping him or her to say “no” or decide to consider giving at a later time.

C. When a commitment is made with or without a commitment card, follow up with a handwritten thank-you note on a letter stating clearly what was committed and over what period of time. If a commitment card was completed and received, enclose a copy of the commitment card with the thank-you/confirmation letter.

D. Immediately following the meeting, write down any information on the prospect’s giving or comments on others’ giving that were made and add this data to the PPL for each Priority One donor. This will include anything related to planned giving, ownership of businesses, stock, land, expected changes in financial position or giving patterns, including gifts to other groups, as well as personal information such as background on family, education and special interests. Remember, this is highly confidential information and should be shared only on a need-to-know basis. We have a confidentiality agreement on the Staff Resources site that we highly recommend anyone dealing with the PPL to fill out. (See Addendum.*)

E. If the prospect asked for additional information, special help or a response of any kind, respond within the agreed-upon time.

“It is important to execute a thorough communication plan with donors regarding the ministry with which we are involved together. Providing ministry updates values individual donors and [deepens] ownership of the ministry from the donor. As part of this communication plan, it is important to thank our donors well throughout the year.”

— Matt Craig, area director, York, Pa.
CHAPTER V
CHANGING A CULTURE: HOW YOUNG LIFE THINKS ABOUT FUNDRAISING

RAYBURN AND TDS

One of the most exciting things about Taking Donors Seriously is that it parallels the philosophy of ministry that Jim Rayburn talked about so well and so much during his founding and development of Young Life. This parallel, expressed below, is a wonderful way to remind ourselves that fundraising can be carried out in a relational way and is compatible with and supportive of our ministry with kids.

JIM RAYBURN’S PHILOSOPHY OF MINISTRY

1. Jesus is always the focus.
2. It’s a sin to bore a kid with the Gospel.
3. Adventure and fun are necessary ingredients in working with kids.
4. Camp should be attractive to be consistent with the message.
5. Winning the right to be heard is vital.
6. Reaching every kid is our goal.

TAKING DONORS SERIOUSLY

1. Jesus is always the focus in fundraising.
2. It’s a sin to bore an adult with fundraising appeals.
3. Adventure and fun are necessary ingredients in relating to adults when asking for money.
4. Fund-raising events and materials should be attractive to be consistent with the message.
5. Winning the right to ask is vital.
6. Reaching every adult who has a heart for ministry to kids is our goal in fundraising.
In Young Life there are many examples of individuals and committees who have intuitively practiced the principles of TDS and been very successful in raising money. But overall, committees and staff have developed a fund-raising culture where everyone works very hard at fundraising and takes it seriously. In the process, they frequently lose sight of the donor. They have driven fund-raising appeals by references to area debt, not being able to pay staff and a variety of other crises.

In Taking Donors Seriously, the focus is pointing kids to Christ and looking for people who believe that this is one of the most important missions today. TDS also places a very high value on staff and volunteer committee members’ time. It minimizes time committed to fundraising and maximizes time and effort in ministry to kids and leaders.

Here’s the culture change needed for Taking Donors Seriously:

**YOUNG LIFE’S FUND-RAISING CULTURE**

<table>
<thead>
<tr>
<th>Before TDS</th>
<th>After TDS</th>
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<tbody>
<tr>
<td>Activity driven</td>
<td>Strategically driven</td>
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<tr>
<td>Do, do, do, do, do, do, do, do</td>
<td>Think, then do</td>
</tr>
<tr>
<td>Fundraising</td>
<td>Taking Donors Seriously</td>
</tr>
<tr>
<td>Money driven</td>
<td>Mission driven</td>
</tr>
<tr>
<td>Mass marketing</td>
<td>Efficient and effective</td>
</tr>
<tr>
<td>Do more</td>
<td>Do the strategic</td>
</tr>
<tr>
<td>Work harder</td>
<td>Work smarter</td>
</tr>
<tr>
<td>Raise money as we spend it</td>
<td>Raise money before we spend it.</td>
</tr>
<tr>
<td>Sept. 30</td>
<td>Oct. 1</td>
</tr>
<tr>
<td>All committee members solicit donors</td>
<td>All committee members find their niche.</td>
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</tbody>
</table>

TDS is practicing with adults in fundraising what we do so well in our ministry with kids: caring for them, understanding their interests and needs, and taking them seriously. TDS is about partnering with God in the ministry of His resources.
CHAPTER VI
GUIDING PRINCIPLES

Here are the key principles to create and maintain permanent positive cash flow. Put your fundraising on autopilot!

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<thead>
<tr>
<th>THE PRINCIPLE</th>
<th>THE PRACTICE</th>
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</thead>
<tbody>
<tr>
<td>1. People give to people.</td>
<td>People give to people they know and trust. And trust is why people give. It takes time to build trust — to build relationships with donors. The key is to identify those who have an interest in the mission to kids, and stay with them over time. Don’t focus on their money, focus on the mutual interest you have in kids.</td>
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“People have never been interested in a dollar amount — what they seem to be interested in is our friendship and history, or the mission of Young Life reaching lost kids. This helps a great deal when we are out in the trenches. Invest in the people God puts in our lives and invest in the mission of reaching the lost — this will raise the funds.”

— Eric Scofield, Young Life San Diego Regional Director

If you’re starting a new area, keep in mind the hardest cause to raise money for is a new cause. Donors don’t know what it’s about and don’t know its leaders. Get commitments from a few select people who are already committed to kids for 70 to 80 percent of what you’re going to need for the first three years. This will get you launched while you build relationships with new prospective donors in your new area.

The asker is the reason the donor is willing to give to your endeavor rather than someone else’s. So when we’re going to donors individually and meeting with them face to face, we need to make sure we have the right person asking for the gift.
### THE PRINCIPLE

**II. 180 degrees.**

- Just as kids need to be treated as individuals, so do adults — especially when it comes to fundraising.
- Be sure to view your donors in terms of their Ability, their Interest in the mission and their Motivation to give (AIM), NOT as you wish they were.
- We need to make sure committee members choose their own roles in fundraising that fit them based on their interests, giftedness and relationships with donors.
- If we approach all of our donors in the same way — that’s typical fundraising. If we ask every committee member to ask people to give to Young Life — that’s committee abuse.
- Look at the donors on your Prospect List and develop a strategy that engages them based on who they are. This same strategy will identify the right person — not necessarily a committee person — to be the asker.

Thinking strategically makes the task easier for all involved — askers as well as donors. It helps us minimize fundraising so we can maximize our ministry to kids.

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<table>
<thead>
<tr>
<th>A. Asking for commitments builds relationships.</th>
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<tbody>
<tr>
<td>We tend to think of relationships in terms of warm fuzzies and enjoying time with a friend. That's part of a relationship, but relationships grow through both parties asking each other for commitments. Asking for a financial commitment from a donor, in the context of a relationship with our mission to kids, requires that:</td>
</tr>
<tr>
<td>1. We always let the donor know ahead of time when he or she is going to be asked for money.</td>
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<tr>
<td>2. We ask for an amount we think he or she can give.</td>
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<table>
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<tr>
<th>B. A few do a lot, and many do a little.</th>
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<tr>
<td>Strategies for successful Capital Campaigns and Annual Operating Funds differ. While the 80/20 rule holds true for the general world of fundraising, we find that healthy annual operating funds normally operate at 70/30.</td>
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_“TDS has allowed me to spend less time raising funds and more and more time in ministry with kids. Before I understood TDS, I would spend 80 percent of my time worrying and looking for money. Now I’m more strategic in recruiting committee and TDS members. I’m looking for people with different talents and gifts.”_  
— John Holmes, St. Louis Urban

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**CHAPTER VI GUIDING PRINCIPLES**
<table>
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<th>THE PRINCIPLE</th>
<th>THE PRACTICE</th>
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<tbody>
<tr>
<td>B. A few do a lot, and many do a little. (continued)</td>
<td>Find out who the 30 percent of our sources are — individuals, families, churches, foundations, businesses — that have the potential to give a large proportion of your budget each year. The goal is to minimize fundraising so you can maximize ministry. You must look to the 30 percent in your community who can do the heavy lifting.</td>
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</table>
| C. The most effective way to raise money is to ask everyone face to face, based on individual financial ability and interests. But, seeing everyone face to face is terribly inefficient. | • The most efficient methods in fundraising — small groups, large groups, letters followed by phone calls and events — should be geared to 70 percent of the donors who will give about 30 percent of the budget.  
• The focus of at least 70 percent of the local committee needs to be geared toward the 30 percent of donors who not only have the ability to give large contributions, but have a relationship with Young Life and a giving lifestyle. This group can give a very large percentage of the budget. Concentrate 70 percent of your fundraising time on these donors.  
• To minimize time in fundraising, you need to invest and leverage your time strategically. |
| D. Sales people succeed for one or more of four reasons: | Young Life is committed to a relational approach to kids that’s centered on a commitment to listen. Listen to donors just like you listen to kids.  
1. They’re good listeners.  
2. They’re positive.  
3. They’re enthusiastic.  
4. They’re salespeople. | Be positive. Don’t cry over what you don’t have. Tell folks how much money you’ve already raised, how many people are backing you, and how God is already working miracles for this effort. People want to play with winners!  
3. They’re enthusiastic. We are enthusiastic. We’re not talking about superficial or insincere enthusiasm, but a deep and sustained commitment to kids and a desire to see them come to Christ. |
**THE PRINCIPLE**

4. *They’re persistent.*

We need to pursue! The number one cause of failure in fundraising is the lack of follow-up. TDS is designed to teach you how to overcome this weakness, both in asking and follow-up. Not because we’re committed to fund-raising techniques, but because we’re committed to Taking Donors Seriously in relationship to the ministry of bringing kids to Jesus Christ.

**THE PRACTICE**

- We can have great attitudes, think about fundraising right and really love and appreciate people, but we have to DO IT! We’re meeting with donors, sending letters and contacting donors in various ways when we’re not asking for money. We’re building relationships where we’re winning the right to ask for financial gifts.

- Simply running around asking people for money will defeat you. Positive cash flow comes from living your case statement and calling people to give to a ministry for kids — not to fundraising techniques or financial crises.

- If we’re fundraising without our case statement, we’re going to wear out and so are our donors. But our relationship will prosper and grow when we focus on our vision for reaching kids for Christ.

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“*The area director and I made two very successful donor calls. Four months later we realized that we had not heard from either one of them. We had failed in the follow-up.*”

— Committee Member

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E. “Ask and ye shall receive ...”

- Fundraising is viewed as a necessary evil by most inexperienced fundraisers. The best way to raise money is with the same goal and approach that we have with kids: focus on Jesus Christ and treat people well.

F. Let’s do it superbly.

We’ve looked outside our mission for how we should fundraise. Now we’re looking at who we are and who the people are who believe in what we’re doing. We need to stop resenting fundraising and accept the wonder of: “Ask and ye shall receive.” We’re determined to excel at following this Scripture that captures the essence of area funding!
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<tbody>
<tr>
<td>G. People give because they’re asked and shown how.</td>
<td>Donor surveys indicate that the most common reason people give to a cause is because they’re asked. No fundraising effort has ever failed because too many prospects said “no,” but many have fallen far below their potential because too few were asked.</td>
</tr>
<tr>
<td></td>
<td>If we’ve identified people who have an interest in our mission, and have a realistic expectation about what they might give, the most important thing we can do is go to them in a way that fits them, and simply ask them to consider supporting the mission. We do people a great service when we go directly to them, either individually or in a group setting, and ask them to consider a specific financial gift.</td>
</tr>
<tr>
<td></td>
<td>Often we make two mistakes when we ask people for money. First, we approach them and give them any number of choices of gifts, from modest amounts to very high amounts. This makes it harder for them to make a decision.</td>
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<td></td>
<td>Second, we don’t have a clear strategy on how to ask everyone on our prospect list (directly) each year for their support. If we hope to ask someone for support at the banquet and he or she doesn’t come, that person is often not asked to give that year.</td>
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<tr>
<td></td>
<td>Many areas send a letter to people who didn’t attend the banquet, or who did attend but did not give, and expect the letter to solicit a gift effectively. The fact is, sending a letter asking for money is essentially worthless unless it is followed up with a phone call seven days after it is sent.</td>
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<tr>
<td></td>
<td>When asking for money, we should suggest when we would like to receive the gift. In most cases, particularly at banquets and with letters followed by phone calls, encourage monthly commitments.</td>
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<td></td>
<td>When we’re meeting with key individuals, couples, families or churches who can give substantially and are inclined to give quarterly, semiannually, or multi-year gifts, we should ask accordingly.</td>
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<td></td>
<td>It makes sense not only to ask donors and prospective donors to give money, but also to ask for their involvement in ways that fit who they are. This may mean becoming a volunteer leader, joining the committee, attending summer camp as an adult guest or being on work crew.</td>
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<td></td>
<td>As people become involved, they will develop a sense of ownership. This, in turn, will motivate them to give more in line with their abilities.</td>
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</table>
THE PRINCIPLE

H. There’s no such thing as a “no.”

THE PRACTICE

A few people will say “no” and give a reason related to a clear sense of mission and commitment to another ministry or cause. A high percentage of those who say “no” will qualify it by referring to timing or circumstances that, in most cases, will eventually change so they could say “yes.”

Often, we’re out raising money when we need it, and when someone says “no” our emotions are such that we hear little or nothing of the explanation for when they could say “yes.” If we’re raising money before, or early in the fiscal year, when we don’t need it right away, we’re more open to hearing the explanation. Often these people can plan ahead to consider a gift in the future at the point when we need it.


## CHAPTER VII

### QUESTIONS AND ANSWERS

Before TDS there was no unifying concept. Events and activities were planned on the basis of financial need. There was no required or recommended order. Most areas started with a banquet to raise as much money as possible and then planned more events until their budget was raised.

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<tr>
<th>THE PRINCIPLE</th>
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<tr>
<td><strong>A. Why is TDS better than typical fundraising methods?</strong></td>
<td>TDS presents a unifying concept — a philosophy based on the seven non-negotiables.</td>
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<td>The Priority Prospect List (PPL) is the key element and needs to be bullet-proof. If the PPL is incomplete or built carelessly, nothing can make up for it and the case statement will lose its potential leverage. Regardless of the quality of the case statement, the leadership and the Financial Master Plan, all will suffer if there is a weak PPL.</td>
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<td><strong>B. What about the heavy hitters of fundraising?</strong></td>
<td>Most of what we see in the big league of fundraising — maybe 80 percent — is fund-raising activities and events. We see jog-a-thons, bowl-a-thons, auctions, dinners, golf tournaments and telethons. To a lesser degree, we observe fund-raising programs that are not event driven or premium driven. In these cases, people are asked to give to a mission without the hype of an event.</td>
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<td>We rarely see fund-raising efforts that focus on planned giving or estate planning where donors are asked to look at all of their resources and maximize them over time, particularly after they die — but we show them how to do this. This must be part of a complete area strategy.</td>
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<td>At its best, fundraising is driven by a focus on mission and ministry that is developed through relationships with people. These relationships evolve into greater involvement in the mission and ministry. A mature relationship with the donor is one where the donor is committed to the mission and ministry regardless of who the staff and committee people are. This commitment is focused on the mission and being part of the mission in the community for a lifetime rather than depending on cultivating relationships to maintain interest.</td>
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— Justin Forbes, Area Director, St. Augustine, Fla.
C. How do I form relationships?

The relationship you’re trying to develop with a prospective donor in fundraising for Young Life flows out of these questions:

1. Has the donor been involved in Young Life?
2. Is the donor connected/related to someone in Young Life?
3. Is the donor interested in kids?

The question always is: Where is the donor in relationship to these three questions? Start with some basis for the relationship rather than simply approaching a potential donor and resolving to build one.

The key is to identify who should encourage the donor’s financial support over the long term. In all our contacts with donors, we should be listening and use what they tell us to define the relationship. If we take them seriously, stay with them over time and listen to them carefully, we will invariably find the relationship will change and almost always grow.

Adults, like kids, are spread across a wide relationship continuum. When we seek to encourage key prospects to give to Young Life, some of them may be open to a lot of contact and a close relationship may develop. There will undoubtedly be others who may give significantly but will prefer very limited contact. In a relationship-driven, fund-raising effort, we need to keep asking: Who is the donor and who am I in relation to them? If we’re faithful in that regard over time, even distant relationships will develop into more active contact and involvement as trust is built.

D. How do we find new donors and what is a donor family?

The best prospective donor to a Young Life area is someone who has given before. The more recent the gift, the better the prospect. If a prospective donor hasn’t given previously, but has had some involvement with Young Life or has a professed interest in ministry to kids, she or he is a good prospective donor.

We need to discover our donor family based upon their relationship to Young Life and our ministry to kids. We are not just looking for people who think we’re a nice non-profit and will give us a few bucks like they do with every other community group. The bottom line is this:

Every area needs to identify and work with a family of some 150 to 200 donors who have had previous contact with Young
Life, know someone in Young Life, or are members of the donor family by virtue of their declared interest in ministry to kids.

As we take good care of our family, the word will get out and others will want to join in a natural way, not in a way that was created by fundraising.
I. STAGE ONE — COMPILATION (ONE MONTH)

During this stage the area director should commit to spending one-and-a-half days per week on these goals until you have all of the five goals listed below accomplished. This should take no more than four weeks to complete.

A. Develop a strategic plan in your area involving key donors, committee members, TDS members, volunteer leaders, pastors, and community leaders.
   1. Identify and pray for people to be a part of this process.
   2. Set aside a three-hour block of time to implement the process.
   3. End result would be more ownership (what people create, they own).
   4. Subcommittees would be created around key parts of the vision, and one of the subcommittees would be financial health (TDS).

B. Create a TDS team for your area. Begin with the subcommittee from your strategic plan.
   1. Find your team in the top 20 percent of your current donor base.
   2. Ask the question: “Who among the top 20 percent is a small business owner?”
   3. When asking someone for a commitment, give a specific job description, why you specifically need him or her for the job, and a time frame for his or her service.

C. Develop an “Area Monthly Prayer Strategy” that focuses on and has a person (other than the area director) on point for implementing the prayer strategy:
   1. Kids
   2. Leaders
   3. Committee members
   4. Donors

D. Build your area Financial Master Plan (FMP) and include:
   1. Events — Every area should have at least one event (banquet, golf, other), and events should clear at least $10,000 each.
   2. Communication — Plan for monthly emails, newsletters, and more.
   3. Thank-You Notes — Every donor should receive at least four thank-you notes per year.
   4. Asks — Plan exactly when and who is going to ask donors for money.
   5. Critical Path — Who is responsible to do what is to be done each month?
E. Write an “area case statement” and include:
   1. Where the area has been and where it’s going.
   2. Explain the financial need.
   3. Show the “territory/vision” map.

F. Construct an area PPL and Cash Flow, which includes a:
   1. Priority Prospect List (PPL), which (at minimum) identifies the priority one and priority two donors (top 40).
   2. And a Cash Flow Analysis (CFA), which forecasts the budget and projected income for the year.

II. STAGE TWO — IMPLEMENTATION (TWO MONTHS)

During this stage the area director should commit to spending one day per week until the following five goals have been met:

A. There should be five visits per week with major donors (Priority Ones and Twos) — The goal of these meetings is to ask for their gifts and show them the newly created case statement.
   If they have already made their commitments for the fiscal year, then the goal is to show them the case statement and thank them for their gifts.
   1. The area director makes three of these visits.
   2. The other two visits are made by non-staff — The TDS team? Committee folks? Often the area director will coordinate this.

B. Meet with your committee chair and explain that he or she needs to be the one who holds everyone (including you) accountable for doing what they are responsible for on the FMP.

C. Update the Cash Flow and PPL weekly with all of the new information collected from the five meetings that occurred during the previous week.

D. Begin implementing the FMP that you created in stage one.

E. Meet every other week with your TDS team.

F. The prayer coordinator should begin implementing the prayer strategy created in stage one.

III. STAGE THREE — MAINTENANCE (70/30 PRINCIPLE IN FULL GEAR)

This is the final stage — from here on out area directors should commit to spending half of a day weekly on an ongoing basis.

A. Update the Cash Flow and PPL monthly.

B. Be sure that all Priority One and Two donors are met with at least three times per year.
   1. Once to ask, twice to update and thank.
   2. The ask should be done prior to start of the new fiscal year, May–September, prior to the banquet.
C. Meet with one person a week and be sure that a committee person meets with at least one person per week.

D. Continue implementing the FMP.

E. Meet with the TDS team every four weeks for remainder of the year. The meeting in May should be to create and approve the next fiscal-year budget and review and update the case for the next fiscal year.

That’s all there is to it — easy to read, hard to do. But that’s why YOU are the area director. You’re the person your area depends on to lead, and they chose you because of your “can do” attitude and your faith that can move a mountain!

Once you’ve met the goals in the Three Stages of TDS, you’re not only comfortable with fundraising in your area — You are SUCCESSFUL! You’ve moved a mountain!
### Young Life Monthly Prayer Calendar

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<th>Day</th>
<th>Prayer Requests</th>
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<td><strong>Sunday</strong></td>
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<td>1. Give thanks for the many blessings of this week.</td>
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<td>2. Pray that the Lord will have mercy on those in need.</td>
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<td>3. Pray that the Lord will use the talents of our young people for His glory.</td>
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<td>4. Pray for the safety and health of our youth.</td>
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<td>5. Pray for the growth and development of our youth.</td>
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<td>6. Pray for the success of our outreach efforts.</td>
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<td>7. Pray for the effectiveness of our discipleship programs.</td>
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<td>9. Pray for the health and welfare of our families and friends.</td>
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<td>10. Pray for the success of our fundraising efforts.</td>
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<td>11. Pray for the success of our mission trips.</td>
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<td>12. Pray for the success of our service projects.</td>
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<td>13. Pray for the success of our youth events.</td>
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<td>14. Pray for the success of our youth leadership conference.</td>
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<td>15. Pray for the success of our youth leadership development programs.</td>
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<td>16. Pray for the success of our youth leadership training programs.</td>
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<td>17. Pray for the success of our youth leadership mentoring programs.</td>
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<td>18. Pray for the success of our youth leadership coaching programs.</td>
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<td>31. Pray for the success of our youth leadership coaching mentoring programs.</td>
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**APPENDIX A**

**SAMPLE PRAYER CALENDAR**
Southside Virginia Young Life

Going All Out for Kids
A MESSAGE FROM THE STAFF:
Connecting kids and CHRIST in the communities of Southside Virginia

Young Life is a world-class organization for adolescents. Our staff and volunteers enter the world of kids, focusing on what matters to them — fun, adventure, friendship and a sense of significance. In doing so, we earn the privilege of talking to them about something that we think matters most of all — the truth about God and His love for us.

Locally, the ministry of Southside Virginia Young Life is focused on giving every kid in this area an opportunity to hear this message. My hope is that as we do this, we can have adults like you partner with us to help this ministry grow and prosper. By doing so, we will give kids an opportunity to experience life the way God meant us to enjoy it and our community will be much better off as we move into the future. I hope this booklet will help you as you consider what ways you would like to partner with us, and I also want to ensure you that the resources you share with us will be handled with care and responsibility. Thanks for considering this opportunity!

Kenneth Moorefield, Area Director

We are out there in the world of kids.

While all kids are unique, they share significant common needs. They need someone to stand with them and accept them as they are. They need someone to walk with them, to “hang” with them as they make their way in life — someone who demonstrates God’s love and faithfulness as they face choices and trials. And kids need someone to run with them — to share and encourage their desire for a fun, full and meaningful life. That’s what Young Life provides.
THE YOUNG LIFE MISSION:
“Introducing adolescents to Jesus Christ and helping them grow in their faith.”

Local Committee’s Purpose Statement:

Our purpose is to support the Young Life mission of introducing adolescents to Jesus Christ and helping them grow in their faith. We will be faithful in prayer, model Christlike behavior, encourage the staff and volunteers, and actively work to provide financial support and fiscal responsibility in the ministry. We have been chosen to serve, and we will utilize our gifts to do God’s work through the ministry of Young Life.

“We loved you so much that we were delighted to share with you not only the gospel of God, but our lives as well, because you had become so dear to us.”
— 1 Thessalonians 2:8

“Young Life is the best thing that happens in my week!”

We are inviting in all we do.

Young Life is like one big “party with a purpose” where all are welcome and treated like honored guests. It may be club – the best night of a kid’s week; or camp – the best week of their life; or just the invitation to spend time with a leader who has become their friend. But before the party ends, we share a simple message about God’s love for them. After all, that’s what the celebration is all about.
MORE THAN NUMBERS...

Our Area Goals:

- Average 75 kids at each existing club
- Average 25 kids at each campaigner
- Take 40 kids to summer camp
- Know 150 kids by name at each school
- Develop a team of 200 local adults who are committed to either serve on the committee, pray for our ministry or support us financially
- Raise our current budget to ensure the necessary funds to support healthy ministry

We witness changed lives as kids meet Christ.

Young Life believes that every adolescent deserves a chance to consider the Christian faith in terms they understand from people they trust. We encourage those who want to grow in their faith to explore it in study, deepen it in service, share it in leadership and celebrate it in a church of their choosing.
WHERE WE ARE ...

PRINCE EDWARD COUNTY HIGH SCHOOL
We have been doing ministry at this school since Young Life started in our area in 1994. Club meets on Monday and Campaigners meets on Thursday.

RANDOLPH-HENRY HIGH SCHOOL
We started ministry at Randolph-Henry in 2001. We have had a great deal of success at this school. Club meets on Wednesday and Campaigners meets on Monday.

THE FUQUA SCHOOL (UPPER SCHOOL)
We have just started ministry at Fuqua and we are excited about the amount of response we have gotten so far. We hope to begin having Campaigners by the winter and then start club in the spring.

A firm foundation established.
Since 1941, Young Life has been making a difference in the lives of kids around the world because we are invited and supported by adults who care about kids in their community. Our staff and volunteer leaders are trained in time-tested methods of relating with adolescents, and they are equipped by a world-class organization dedicated to effective ministry. Young Life is in more than 50 countries, reaching nearly a million kids each year with the life-changing message of God’s love for them.
WHERE WE WANT TO BE...

WYDLIFE MINISTRY
This is Young Life’s ministry to kids in middle school. We have never had this ministry in our area, but we would like to start it soon at Central Middle School, Prince Edward Middle School, and The Fugua School. We will need the help of more committed adults to make this happen.

OTHER HIGH SCHOOL MINISTRIES
We are interested in seeing Young Life ministry begin at the other high schools in the area. These include, but are not limited to: Buckingham County High School, Cumberland County High School, Appomattox County High School, and Nottaway County High School.

WHERE WE’LL BE

A firm foundation to build upon.

Wherever you find Young Life in the world you will also find adults who care deeply about kids. These are people who understand kids on the most basic level, from the inside out, and offer their support: as volunteer leaders, working closely with kids; as committee members, often parents, supporting local leaders in any way they can; as staff, working with kids, providing administrative support, building and maintaining excellent facilities; as donors, providing financial support.

As you experience Young Life, we hope you will decide that you were made to get involved.
JOINING THE TEAM...

Opportunities:

**Volunteer Leader**
Join a volunteer leadership team. Spend time weekly developing relationships with middle school or high school students.

**Teacher Staff**
If you are a teacher, join the Young Life staff on a part-time basis and lead the Young Life team at your school.

**Prayer Support**
Join our prayer warriors who diligently pray for the ministry of Young Life and kids. Sign up for the monthly e-mail prayer update.

**Leadership Support Group**
Join a team of caregivers that surrounds a particular school's leadership team with support, love and prayer.

**Area Committee**
Join the community supporters who encourage and love the staff and volunteers, as well as provide leadership in fundraising and ministry development.

**Donor**
Partner with Young Life by supporting the ministry with your financial gifts.

### Giving Plan:

| 2 x $5,000  | $10,000  |
| 3 x $2,400  | $7,200   |
| 10 x $1,200 | $12,000  |
| 20 x $600   | $12,000  |
| 30 x $300   | $9,000   |
| 50 x <$300  | $2,800   |
| 115 donors  | $53,000  |

### Budget:

Salaries, Taxes/Compensation: $31,701
Travel, Conferences, and Gas Mileage: $5,945
Program, Training, and Office: $4,739
Fundraising: $1,000
Regional and National Services: $8,890
Total: $52,275
Future Growth: $15,000

The organizational structure of Young Life provides services and supervision through our Service Center in Colorado Springs, Colo. These services include donation receipting, accounting, payroll, personnel, insurance, legal and government reporting.

Young Life is a charter member of the Evangelical Council for Financial Accountability (ECFA) and has maintained that membership through a yearly review of its compliance with the ECFA's standards.

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Yes, I/we want to help Southside Virginia Young Life.

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<th>My/Our commitment is:</th>
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<tr>
<td>MONTHLY: $500</td>
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<td>ANNUALLY: $500</td>
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Please send me information about online giving.

Name: __________________________
Address: ________________________
City: ___________________________
State: __________________________
Zip: ____________________________
Phone: _________________________
Email: __________________________

(Checks payable to Young Life are tax deductible.)
TIME TESTED AND LIFE CHANGING

Contact Work – Young Life doesn’t start with a program. It starts with adults concerned enough about kids to go to them, on their turf and in their culture, building bridges of authentic friendship. These relationships take time, patience, trust and consistency. We listen to their stories and learn what’s important to them, because we genuinely care about their joys, triumphs, heartaches and setbacks.

Kids’ lives are dramatically impacted when caring adults come alongside them, sharing God’s love with them. Because their leaders believe in them, they begin to see that their lives have great worth, meaning and purpose.

Club – Clubs are weekly meetings within a local community that are open to any kid who wants to attend. We like to think of club as a party with a purpose. It’s controlled chaos that’s almost impossible to describe, but kids know it when they see it. And before the party ends, we share a simple message about God’s love for them. After all, that’s what the celebration is all about.

Camp – Kids consistently tell us that Young Life camp is the best week of their life. That’s a rousing (and unsolicited) endorsement! But how else would you describe a week where deep relationships are forged in the midst of mind-boggling fun, where you hear the truth of the Gospel taught and see the love Jesus lived out every day?

Campaigners – Young Life is much more than fun and games, and Campaigners helps kids learn to “walk the talk” and live out the life of faith they’ve embraced. We invite kids to actively follow Jesus — and we’re with them for the long haul to help them take those steps of faith, with unconditional love. While Young Life is not officially connected to any particular church, we believe church to be a vital part of a nurturing relationship with Christ, and we encourage kids to become involved in the churches that are most familiar to their families.

Committee – Young Life is making a difference in the lives of kids around the world because we are supported by adults who care about kids in their community. For every talented Young Life staff person there is a team of dedicated volunteer leaders who works directly with kids. In each community, the local “committee,” comprised of parents, Young Life alumni and civic leaders, provides a foundation of financial, administrative and moral support for the local Young Life team.

Southside Virginia Young Life / P.O. Box 48 / Farmville, VA 23901-0048
younglife.org
APPENDIX C
PERSONAL SUPPORT PARABLE — BE LIKE JANE

Joe Confident is from Richville, USA. Joe grew up going to church but he never really got the “whole picture” about God until he went to Young Life in high school. Joe’s parents were elders in their church and were thrilled when they learned Joe had chosen to join Young Life staff.

Jane Faithful went to high school in Normalville, USA, after having moved around a lot as a child. She didn’t grow up in the church or develop any real roots in any one community. The first time she heard about God was when she started going to Young Life as a teenager. Upon graduation, Jane told her parents she was joining Young Life staff. They were a little disappointed and definitely confused about why their daughter would go to college only to accept a low-paying job where she was expected to raise a significant portion of her own salary.

Both Joe and Jane began their relationship with Christ through Young Life.

Joe and Jane have now been hired to be on Young Life staff in Anywhere, USA. As part of their new job, they’re required to raise $15,000 per year for the next two years in personal support.

Joe tells his new boss, the regional director, that raising $15,000 a year in personal support won’t be a problem for him, he’s got it all under control. Jane shares with the regional director her fears about raising money.

That night Joe goes home and writes a four-page, single-spaced, heart-felt, absolutely passionate letter — a letter so moving that by the bottom of page three, tears are welling up in his eyes. He makes a list of the 25 richest people he knows through his church. Joe sends them each his four-page letter with a pledge card and a return envelope. He goes to sleep counting the money in his mind.

Jane goes home and prays about the overwhelming task of raising $15,000 per year. She asks God to lead her to people who love Young Life, kids, Jesus and her — and who ultimately are people who have a giving spirit. As Jane goes to bed she hands her fears over to God, asking Him to do something great with them.

The next morning Jane awakens thinking about five different people she knows who love Young Life, kids, Jesus and her — and who ultimately are people who have a giving spirit. That very morning she gets in touch with them and sets up breakfast meetings with each of them over the next week. During the week, she meets with these five people sharing her story, Young Life’s story and her financial need. At each appointment, as she shares about kids meeting Christ, she gets teary-eyed. Before leaving she asks each of these five people if they’ll consider being part of the team that reaches out to these kids in Anywhere, USA.

The first folks Jane met with (her best friend’s parents) offer to give her $7,500 per year over the next two years. The second person (a Young Life alumni) offers Jane $200-per-month support. Jane’s third appointment (her grandparents) pledge $100 per month for her support.
The fourth person (the area director in Normalville where she’d been introduced to Christ through Young Life) made a $100-per-month commitment. The fifth person Jane met with (a friend she graduated from college with) offered her $50 per month. In just five meetings Jane raised $12,900 per year for the next two years. At the end of each meeting, Jane went home and sent a hand-written, thank-you note to each of her donors.

Meanwhile, Joe continued to be excited about his four-page, single-spaced, heart-felt, absolutely passionate letter. He was so sure he’d raise a lot of money that he even began to think he could share his donors with Jane. Every day Joe waited patiently by the mailbox. He couldn’t wait to start counting the pledge cards! He was sure that when people got to the bottom of page three of his letter they’d be so moved they’d send more than enough money.

Joe got his first response seven days after sending out his mailing. It was from a really rich family who owned the biggest house in town. He opened it with baited breath to find a check for $50 payable to Young Life. “Certainly there must have been some mistake,” he thought.

On day nine Joe received his second response from one of the elders in his church who always drove a new Cadillac offering to support Joe with $25 per month. On day 14, Joe’s third response came from one of his Sunday school teachers back in Richville. She wrote him a really nice note telling him how proud she was of him and that she’d be praying for him.

At the end of the month when Joe and Jane had a follow-up meeting with their regional director to report on their fundraising — the meeting didn’t go like the first one did. Jane came to the meeting excited to report that she had raised $12,900 of her $15,000 annual goal and Joe came to the meeting devastated.

“Why is it that Jane raised so much money and I didn’t?” Joe asked the regional director. “I’m from a richer town! I know so many people and my four-page, single-spaced, heart-felt, absolutely passionate letter was so great,” he protested.

The regional director calmly asked Joe, “Well, Joe, how would you get kids to sign up for Young Life summer camp?”

“I would hang out with them and tell them how great it is,” Joe exclaimed. “And I’d invite them to join me in the greatest adventure of their lives!” As he spoke the words, he realized the error of his ways. Looking at Jane, Joe said, “That’s exactly what you did to raise your money.”

Joe left that meeting and set up four appointments for the following week. He raised the rest of what he needed by sharing his story relationally.

Joe and Jane both made a commitment to follow up with their donors at least four times per year to share the impact that the donor’s investment was having on kids coming to know Christ.

The moral of the story is to “be like Jane.”
APPENDIX D

THE PERSONAL SUPPORT-RAISING PLAN

1. Make a list of approximately 200 people who have one or more of the following attributes:
   a. Love you (or someone like your parents’ best friend).
   b. Love Jesus.
   c. Love kids.
   d. Love Young Life.
   e. Have a giving spirit.

2. Divide the list into three groups by how many of the five they have —
   a. Group 1: All people who are 4/5 or 5/5, plan to not send them a letter, but rather meet with them personally or talk to them on the phone without sending them a letter.
   b. Group 2: For people who are 2/5 or 3/5, send them a letter and follow up with a phone call.
      i. Keep the letter short (total letter should not be more than two-thirds of one page).
      ii. Be direct about what you are looking for from people.
      iii. Follow up every letter with some relational follow-up within two weeks.
      iv. Include a commitment card with a self-addressed return envelope
   c. Group 3: People who are 1/5, send them a letter, but do not ask for money yet — you need to get them up to speed on you and Young Life a bit more before asking for money.

THE PHONE SCRIPT FOR GROUP ONE (GETTING THE APPOINTMENT TO MEET WITH THEM)

1. Introduce yourself.
2. Ask them something about their lives.
3. Tell them up front why you are calling: “I am calling today to share with you how I have been invited to join the Young Life staff in … ”
4. Be enthusiastic, upbeat, but not “over the top” — know your audience.
5. Tell them that you need to build a team of people who will be a part of your support team and you wanted to see if you could get together with them to talk about them being on that team.
6. Stop talking, listen and allow the conversation to go where it needs to go.
7. The goal of the conversation is to get a one-on-one meeting with the appointment — so try and not spill the beans about everything you are doing.
8. If they say they do not want to participate, ask if you can still send them some information on what you are going to be doing as this is a very important step in your life and ask that they might pray for you.
THE FACE-TO-FACE MEETING FOR GROUP ONE

1. Come prepared by:
   a. Bringing your Personal Support Case that includes:
      • Brief personal testimony (2 paragraphs).
      • Five Pictures (including one of you).
      • Picture of city/school in which ministry is located
      • Explanation of your ministry
      • Breakdown of Budget – three categories:
         i. Staff benefits/salary
         ii. Program expenses
         iii. Training
      • Breakdown of Support Plan with coach (taken from PPL)
      • Mission Unit and/or RTD number
      • Link to Online Giving
      • Link to personal blog, if applicable
      • Three-year vision/goals
      • Contact Information
         iv. Name
         v. Personal address
         vi. Where gifts should be sent
         vii. Phone number
         viii. Email address
   b. Wearing business attire.
   c. Being on time for the meeting.

2. First ask about how they are doing (be specific and try to ask a real question — something that is more substantial than “How are you doing?”).

3. Do your best to begin to present Young Life to them as soon as you can — resist the temptation to not talk about the funding.

4. Show them that you are prepared by referring to the information that you brought with you.
   a. Know the demographics, the schools, the boundaries of your area.
   b. Know the history of Young Life and the history of Young Life in your area.

5. Ask them for either a specific amount or ask them if they have thought about a monthly amount they could give to you.

6. Leave a vehicle to give by (a pledge card with an envelope that reflects options, electronic giving, stock, one-time gifts, they can give you a check now or mail it in).
THE PHONE SCRIPT FOR GROUP TWO

1. Introduce yourself.
2. Ask them if they received your letter/case and then ask them if it would be all right for you to talk to them about what you are doing in Young Life.
3. Describe the impact of Young Life (big picture) and then describe the impact of Young Life on one kid you have worked with (preferably).
4. Answer the question: “I am making this decision to join Young Life staff because ... ”
5. Tell them the total amount you need to raise and inform them about how much of that you have already raised.
6. Ask them for either a specific amount or ask them if they have thought about a monthly amount they could give to you.

AFTER THE PHONE CALL OR MEETING

1. Send each individual a handwritten thank-you note.
2. Follow up with the donor to make sure the gift comes in.

THE PLAN WITH GROUP 3

1. Put them on your newsletter and eNewsletter distribution list.
2. After three or four touch points, make phone contact.
3. Plan to take them to coffee to explain what you are doing.
4. Just keep in touch — and get the ministry in front of them.
5. As they become more educated on and engaged in what you are doing, then ask them to be involved financially.
APPENDIX E
THE FUND-RAISING TREADMILL

A treadmill is a great way to go for a five-mile walk without actually leaving the gym. But who would want to live on a treadmill? Too often we feel like we are running on a treadmill raising money. When one event is finished, it’s time to catch our breath and start the next one. Yet sometimes it feels like we’re just not getting anywhere.

THE WAY YOUNG LIFE AREAS TRADITIONALLY RAISE MONEY

Stage 1: The banquet
In October fall is in the air, the new fiscal year has begun and it’s time for our main adult event of the year — the Young Life banquet. The banquet itself goes well. “We had 278 guests this year and the total amount of money raised tonight is $57,395 of the $133,000 budget.”

Stage 2: The end-of-the-year letter
Money keeps coming in throughout October and November from people invited to the banquet who didn’t attend. The week after Thanksgiving the area sends its year-end letter out to the whole mailing list. The letter includes a response envelope. There are lots of envelopes returned in December and plenty more that come in January. Year-to-date revenue for the area is under $64,000 at the end of January. Expenses through January are at about $44,000. Considering the area started the year only $1,200 behind from the year before, the area is more than two months ahead!

Stage 3: Run out of money in April
February is a slower month in terms of income. The treasurer warns everyone to expect that — it’s always that way. March is better, but not by much. Although a church unexpectedly donates $3,000, combined income from February and March is about $14,000. Expenses during February and March don’t slow down — $26,000 is spent. The area is less than one month ahead. April is the pits. Revenue is $2,700. Expenses are at $11,300. The area is now in deficit, about $1,800 behind.

Stage 4: Golf event in May
At the end of the golf tournament, the committee treasurer reports the numbers: The players alone contributed almost $20,000. The corporate sponsors contributed almost $16,000. The event cost about $6,000. The area cleared almost $30,000 — the best golf event ever!

Stage 5: Run out of money in July
May and June were bolstered by the golf money. Most of it, about $22,000, showed up on the May report. The rest comes in June. The area’s balance at the end of June is just above $6,000, a little more than half-a-month ahead. Income in July is slow, July expenses are about $16,000, and revenue is $1,300.

Stage 6: The staff goes on reduced salary
What’s going to happen? The area director receives a letter stating that he or she is experiencing a grace month before his or her salary is reduced. The committee wants to see
something happen, but the next banquet is only a month away, and it feels wrong to ask people for help now and expect those same people to give at the banquet.

**THERE’S A BETTER WAY TO DO IT!**

If you were feeling a tinge of depression from all that fundraising madness and sadness — we have good news for you. Here’s an effective approach to raising funds that will get your area off the fund-raising treadmill.

There is a better way to fundraise — and it’s called TDS (Taking Donors Seriously)! TDS is a way off the fund-raising treadmill.

When the Young Life areas were on the fund-raising treadmill:

1. The focus was on events instead of relationships.
2. There wasn’t a clear plan to raise the area’s budget.
3. No strategy was used — Every donor was given the same effort regardless of his or her ability to give.
4. Responsibilities were not clearly defined.
5. Too much stress and pressure was put on one event — the banquet.
6. The most effective way to raise money — through face-to-face meetings was not used.

**Stage 1: Summer face-to-face meetings with major donors**

In TDS the fund-raising year starts in the summer, several months before the fiscal year begins. Over the summer the TDS team does 23 face-to-face meetings with the area’s major donors. There are five people on the TDS team: three are small-business owners, one is a retired dentist, and one is an engineer who is also the Young Life committee treasurer. The area director also meets with the TDS committee and participates in 12 of the face-to-face meetings. All 23 donors have given to Young Life before, and they all say “yes” to supporting Young Life again. In addition to the 23 face-to-face meetings, the TDS team collects 14 other commitments from its members and the Young Life committee. At the end of August, those 37 donors have committed more than $90,000 to the area for the next fiscal year.

**Stage 2: Hold a banquet in October**

The area holds a banquet in October. All 23 of the face-to-face donors have been invited, but they understand that their commitments have already been made. The banquet is a wonderful event. It feels more like a celebration for “shareholders” than a fundraiser. The committee chair ends the evening by reporting that a few friends of Young Life have already committed $90,000 toward this year’s budget of $133,000. He asks those who have not been given an opportunity to give to jump on board in support of the ministry.

After the banquet ends, the treasurer reports that the commitments and gifts from an additional 110 “giving units” total $30,250. At the end of October, the first month of the new fiscal year, the area has already raised more than $122,000 of its $133,000 budget!
Stage 3: Raise the budget by Dec. 31 and say thanks

The banquet follow-up process, which begins with the letter-phone strategy, results in more commitments and gifts being received. The week after Thanksgiving, the area sends out a year-end letter to all donors who have not made a commitment yet that fiscal year. The banquet follow-up process produces another $6,500 and the year-end letter produces $4,000. By Dec. 31, the area has raised its budget for the fiscal year. The main TDS work in December is spent saying thanks in creative ways to donors. Every donor receives the area’s Christmas thank-you letter with a wonderful picture of kids at camp the previous summer enclosed. The 23 face-to-face donors also receive a plate of home-baked Christmas cookies along with a thank-you note. One donor mentions, “What I appreciate most about Young Life is they spend time instead of money on me.”

Stage 4: Phone-a-thon to retain donors

In February, the area committee and staff spend one evening contacting past donors who have not committed or given this fiscal year. The group raises close to $9,000 that evening. Not everyone they called said “yes” to giving, some people asked to be taken off Young Life’s donor list. The committee sees value in this, also — it helps keep the mailing list manageable and reduces the amount of time and money spent on mailings to people who aren’t interested in receiving them. A few days later a smaller group meets and calls the 38 people who weren’t home the night of the phone-a-thon. They raise another $2,000.

Stage 5: Golf event in May to raise money to send kids to camp

A golf committee, which operates as a sub-committee of the TDS team, plans a golf event for May to raise money to help send kids to Young Life camp. All the promotional material for the event stresses this, and people who have already given for the operating budget don’t seem to mind being asked again to do something to help kids directly. About $12,000 is raised. The camp trip looks like it is going to be the area’s largest ever.

A NEW DAY HAS BEGUN!

What would you do if you raised 125 percent of your budget this year. What could you do? Start a new school? Hire an intern? Start a new ministry? Adopt a struggling area? The bottom line is that by raising 125 percent of what you need, you can step off the fund-raising treadmill and begin to dream about how you and your area can reach more kids who need to hear about Jesus.
APPENDIX F
TAKING DONORS SERIOUSLY
TELEPHONE GUIDELINES
FOR FOLLOWING UP AN APPEAL LETTER

1. INTRODUCTION

Most ministries have a number of potential supporters who are open and able to give in the range of $30 to $100 a month. The challenge is how to encourage these prospective supporters to pledge their support and to reach them in the most effective and efficient way.

Experience tells us that people don’t respond particularly well to appeal letters and many are uncomfortable or irritated with unexpected phone calls appealing for support. In many cases these prospective supporters are not comfortable with face-to-face meetings. The best way to deal in these situations is to send an appeal letter first and then follow it with a phone call.

The key in this approach is including two important items in the letter. First, following a brief introduction and an enthusiastic invitation to support your ministry, the letter should present a narrow monthly gift range, say $30, $50 or $100 per month, for them to consider. Second, tell the recipients you will be calling on specific dates in the week following when the letter will be sent.

The purpose in being specific is to make sure there are no surprises about the level of giving you’re seeking and about their being called to make a decision about giving.

2. THE PLAN

As a caller you should have two things at your phone as you call:

a. A copy of the letter that was sent.

   Become very familiar with this letter so you can refer to it naturally and incorporate the basic ideas as you converse.

b. Forms to fill out with information about the people you’re calling.

   As you begin to call each individual on your list, before you dial, fill in the prospect’s name, the date and the phone number. For each person you talk with, complete the various sections of the form.

   If you get a busy signal, “she’ll be home in a half hour,” no answer, an answering machine or any other situations where there is no actual discussion, keep the form in a special pile and redial these numbers later.

   As you talk with people, begin to write (scribble) notes on a separate sheet and then have your Data/Financial Manager transfer the data to the PPL after the call is completed. The more accurate and complete the data, the better job you’ll be doing.

   These forms for recording the data you collect in your calls are very important
equity in your fundraising efforts. Please take careful notes on what each person says, since they may very well give the kind of information that will direct your strategy over the coming months.

3. YOUR SCRIPT

You essentially are trying to have a conversation that will make a positive impression. Fundraising is important, but it’s not the only item on your agenda.

You’re not “selling” in the telemarketing sense but following up the interest people have demonstrated as relatives, friends and acquaintances and/or by their past support. Affirm those you call based on your relationships, what you know about their interests, and that ultimately they are investing in the kingdom, not simply helping pay your expenses.

Remember, this is a person-to-person process, not a fund-raising deal or an organization calling. Represent your own commitment, your own feelings, and ask the person on the other end of the phone to join with you in a great and important calling.

a. The Approach

You’re not going to be following a tight script. Here’s the approach if you don’t know the people you’re calling very well:

i. Identify yourself clearly by name and by the recent letter —

“Hello, this is John Doe following up the letter we/I sent about our _____________________.

“I’m calling a number of individuals tonight to follow up the letter I/we sent last week about making a monthly commitment to our ministry of ____________________. I know you must get a lot of mail, but I’m hoping you had a chance to read our letter and had time to consider making a commitment.”

ii. The opening idea is to give them some identifying information. DON’T begin by asking them, “How are you tonight?” Or “What’s the weather like in Poughkimpsee?”

iii. If you know them well, take some time up front for small talk. Then move to i.

Now, turn to the financial question. At first, be direct not inductive. That is, don’t ask a question.

“As you realize, a ministry like this needs faithful, monthly support. The letter you received was intended to make you aware we would be calling and to let you know what we would be asking for.”

We are hoping you would consider making a monthly commitment of $50 and be part of our support team. On an annual basis this would be a total gift of $600.

“Would that be possible?”

iv. Be upbeat, showing interest in them, but don’t come off flip or too familiar.
If they’re antagonistic, then become inductive, asking questions. Good listening and note taking at this point will be very important.

v. In virtually every case — unless they hang up or say they’re unemployed — ask for the gift. But, DON'T BEG OR APOLOGIZE for fundraising, calling them or asking for their support.

b. Their Responses
   i. "Yes!"

   Our Responses
   “That’s great, thank you very much!
   Please fill out the commitment form tonight and send it in the self-addressed and stamped envelope you received. Once again, thank you very much!”

   ii. "Could we give $100 now and not make a monthly commitment?"

   Our Responses
   “ABSOLUTELY! Thank you very much!
   Please make out your check tonight and send it in the self-addressed and stamped envelope you received. Once again, thank you very much!
   I hope we might have the chance to talk again in a few months and see if, at that time, monthly support might be possible.”

   iii. “My wife/husband and I want to think about it. We’ll let you know.”

   Our Responses
   “I understand. When you talk with your wife/husband would you be willing to consider our request of $50 a month? If it’s all right, I’ll call back in two weeks, unless I hear from you first.”

   iv. “I’m not sure what I’ll do.”

   Our Responses
   “I understand. I appreciate your interest in our ministry and willingness to consider giving. If you don’t mind, I will call back in a week unless we hear from you first.”

   v. “No, I don’t think so, we can’t give now.”

   Our Responses
   “Well, based on what you’ve said, I can understand. Would you mind if I call back in the spring to see if that would be a good time?”

   vi. “What letter are you talking about? I don’t recall any letter.”

   Our Responses
   “Last week I sent a letter about our ministry for the coming year. In the letter I suggested you consider a commitment of $50 a month. Would that kind of gift be possible?”

   vii. “Are you crazy?”

   Our Responses
   “Our ministry is vitally important in this community and this is one of the only ways we can contact many prospective donors for support. I apologize for disturbing you.”

Remember, thank them again!
### LETTER-PHONE CALL INFORMATION SHEET

Date_________________

**NAME**__________________________________________ **PHONE** ________________

**ADDRESS** __________________________ **CITY** ____________ **STATE/ZIP** _________

**PREVIOUS GIFTS:** This Year $_________ Last Year $___________

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