



LOCAL PROGRAM TRUSTRAISING MANUAL

Updated 01.2024

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INTRODUCTION

Fundraising Myths

1. **Fundraising is a necessary evil**
 - ◆ In our culture, money is an idol. We tiptoe around it.
 - ◆ **The truth:** Fundraising is a beautiful, biblical blessing of giving believers the opportunity to sacrificially partner in eternal work (Phil. 1:3-5, 4:15-20)
 - ◆ Be bold and excited to offer them the opportunity!
2. **Fundraising is disproportionately difficult**
 - ◆ Using our natural intuition and ineffective strategies (e.g., bake sales, car washes, chicken dinners, posting on social media) rarely works which can make fundraising seem particularly challenging
 - ◆ **The truth:** Fundraising is actually simple when using proven strategies and processes
3. **Fundraising is fundamentally about funds**
 - ◆ **The truth: Fundraising is about building TRUST**
 - ◆ Your job is to cast a clear vision for the future. Then, it's up to the individual to decide whether they trust that, by God's grace, you will get it done.

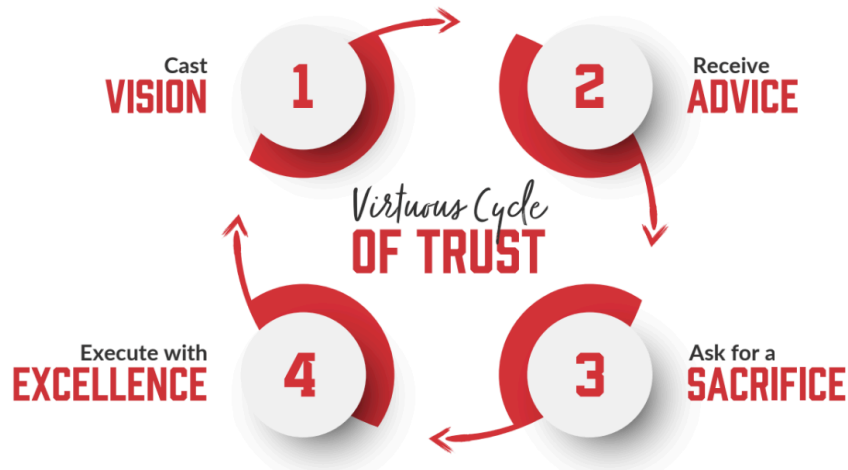
Five (and a Half) C's of Trustraising

1. **Commonality**
 - ◆ Demonstrate that you have something in common (shared life experiences, passions and relationships)
 - ◆ **Phrase to remember: "Close the triangle of trust"**
 - ◇ If you're connected through a referral, spend plenty of time talking about that mutual connection
2. **Connection**
 - ◆ Establish a relational connection. Hear their story. Learn about their family, their values and what prompted them to meet with you.
 - ◆ Remember that this isn't a transaction—it's a partnership, a relationship
 - ◆ **Phrase to remember: "Focus on the family"**
3. **Commitment**
 - ◆ Demonstrate gospel-centeredness and servant-mindedness. Show that you have your heart in the right place.
 - ◆ People need to know that you and LifeWise are all about the gospel
 - ◆ **Phrase to remember: "Major on the majors"**
4. **Competence**
 - ◆ Demonstrate that you will get the job done with excellence, as a good steward of the resources you have been entrusted
 - ◆ **Phrase to remember: "People don't want a plea. They want a plan."**
5. **Clarity**
 - ◆ People want to know exactly what's happening, exactly what's needed and exactly how they are being asked to partner
 - ◆ Use the Seven-Step Ask to provide clarity
 - ◆ **Phrase to remember: "Clarity breeds confidence. Confidence breeds commitment."**
- 5.5. **Consultation**

- ◆ Ask for the donor's advice. Why?
 - ◇ We need it!
 - ◇ People want to give it
 - ◇ Once someone has spoken in, they will be more invested
- ◆ Ask, "What do you think? Do you have any feedback? What else?"
- ◆ This is not always possible (i.e., group presentations)
- ◆ **Phrase to remember:** "If you want advice ask for money. If you want money ask for advice"

The Virtuous VASE Cycle

This is the philosophy behind the two major Trustraising Strategies (the Kickoff Campaign and LifeWise 101s).



1. **Vision**
 - ◆ Cast a clear vision:
 - ◇ What the future can be
 - ◇ A plan (not a plea)
 - ◇ Use the 5.5 C's of Trustraising
 - ◇ Use the Seven-Step Ask
 2. **Advice**
 - ◆ Receive advice:
 - ◇ "What did you think?"
 - ◇ "What feedback do you have?"
 - ◆ Let people speak in
 3. **Sacrifice**
 - ◆ Ask for a sacrifice
 - ◆ Remember: it's an honor to participate in eternal work!
 - ◆ Trust manifests in sacrifice
 4. **Execute**
 - ◆ Execute with excellence
 - ◆ Honor sacrifice by working smarter *and* harder by God's grace
 - ◆ Exemplify the Core Values of Commitment and Competence
 - ◆ By God's grace, get it done
- Repeat!

The Seven-Step Ask

This script provides an outline for conversations with ALL potential donors, volunteers, etc. You will see variations of this come up again and again throughout this document and other LifeWise materials.

The Basics: Steps 1-3 are the introductory points to get people who are new to the mission up to speed.

1. **Why?** Share the great need for Bible education among public school students.
2. **What?** Share about the opportunity of released time.
3. **How?** Share about LifeWise. Consider going over the LifeWise “Secret Sauce”

The Update: Steps 4-6 are the “update” script that should be used for everyone, especially those already engaged with the mission.

4. **Where have we been?** Describe what has already been accomplished.
5. **Where are we going?** Cast the vision for the future. Articulate goals clearly.
6. **What will it take?** Share specific needs relevant to the audience (e.g., prayer, volunteers and financial needs). This will potentially involve showing a budget or other goals.

The Ask: The exact content of step 7 will vary based on the audience.

7. **Ask.** Be very clear, asking for exactly what is needed, and let the person respond.

Four Trustraising Strategies

Two Major Strategies

The Campaign

- ◆ Develop and refine the Strategic Plan
- ◆ Namestorm contacts with suspected financial and network capacity
- ◆ Ambassadors extend invites to read the Strategic Plan
- ◆ Board members conduct feedback interviews
- ◆ Chairperson solidifies pledges

LifeWise 101s

- ◆ Host one-hour, informational tours regularly for members of the community to hear about the vision of LifeWise and see it in action
- ◆ Follow up diligently with attendees, enlisting them as new donors and volunteers

Two Minor Strategies

Church Presentations

- ◆ Give 10-minute presentations at local churches
- ◆ Ask families to donate small ongoing monthly ACH gifts (\$20, \$40, \$80)

Annual Events

- ◆ Schedule an annual event, usually a dinner or lunch, to celebrate all the Lord is doing, cast vision for the future and enlist new donors
- ◆ Recruit table hosts to fill tables
- ◆ Share where you’ve been, where you’re going and what it will take to get there
- ◆ Make a CLEAR ask for attendees to commit to recurring support

Day One Priorities For New Programs

- ◆ Determine the Loot Leader. Look for someone who represents LifeWise with excellence, owns this process and holds others accountable.

- ◆ Communicate the expectation that leadership board members participate in fundraising strategies and personally contribute a meaningful gift.
- ◆ Get started on the Campaign!

STRATEGY ONE: THE CAMPAIGN

The Campaign is a proven process to develop the human and financial resources for a successful LifeWise program launch. **The goal is to secure 100% of personnel and financial pledges needed for three years of LifeWise operations through pledges from an ever-growing Ambassador Team**, providing a runway to secure broad, recurring support.

Quickstart Guide

Prep Work

- 1: Identify the Campaign Chairperson**
The Chairperson will typically be the Program Director or Loot Leader.
- 2: Refine the Strategic Plan**
Use the [Large District](#) or [Small District](#) Strategic Plan Template and customize it using the instructions found on the last page of the template. **NOTE: the plan is an internal document and should not be shared broadly—only one person at a time through the campaign process.**
- 3: Train Your Board**
Schedule a meeting to review the Campaign strategy with your Board members. Prior to the meeting, all Board members should acquaint themselves with the resources found on the [Ambassadors](#) and [Board Members](#) Campaign resource pages.
- 4: Namestorm**
Develop a list of contacts and add them to the [Campaign Spreadsheet Template](#). Each Board member should identify three or more contacts with suspected financial and network capacity. (Only the Director, Loot Leader and Program Coach should have access to the spreadsheet.)
- 5: Schedule Meetings**
Create a schedule of monthly Ambassador Team meetings; 30-45 min video calls are recommended with occasional in-person gatherings intermixed. Put them on the calendar.

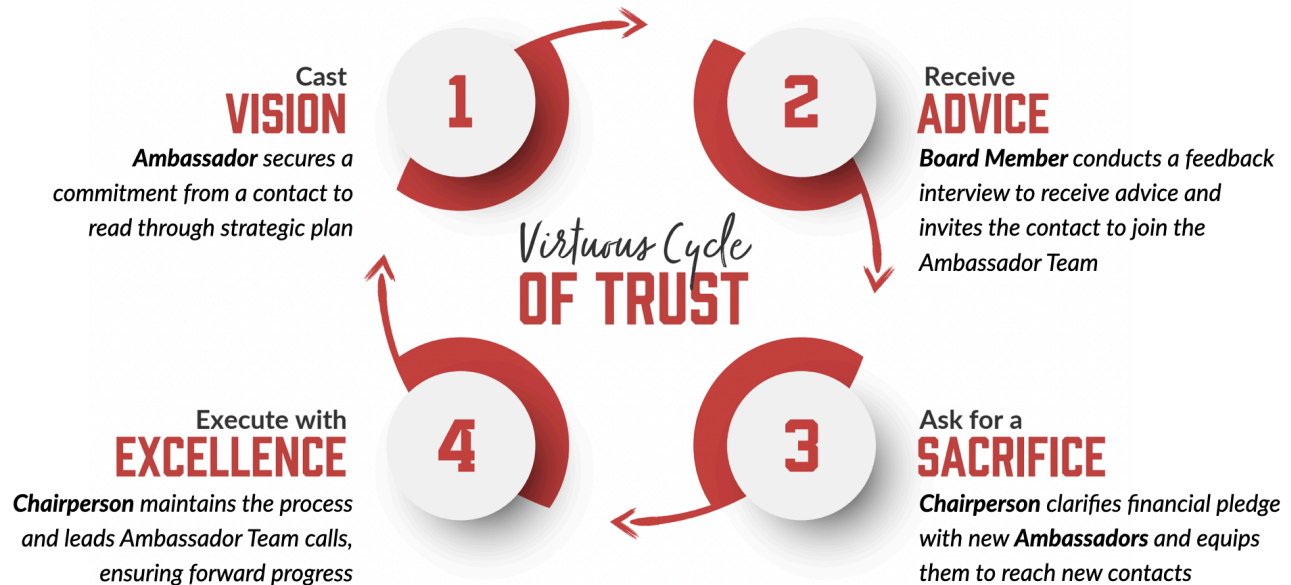
Get Started!

- Process Step 1: Ambassadors (Board Members) Extend Invitations**
Using the [Ambassadors – Extending Invites](#), Board members, serving as Ambassadors, invite contacts to read the strategic plan and give feedback. The Chairperson follows up by sending the strategic plan and scheduling feedback meetings.
- Process Step 2: Board Members Conduct Feedback Interviews and Recruit Ambassadors**
Using the [Board Members – Feedback Interview Packet](#), Board members conduct feedback meetings with contacts and challenge them to get involved by joining the Ambassador Team.
- Process Step 3: Director (and/or Chairperson) Solidify Pledges**
The Campaign Chairperson connects with all new Ambassadors and provides them with a meeting schedule, a link to the [Ambassador Resources](#) webpage and the [Ambassadors – Extending Invites](#) document. Pledges should be confirmed after new Ambassadors have some experience in their role (2-4 weeks or so).

Finally ... Continue the Cycle!

Continue monthly meetings with the growing Ambassador team until the goal is reached.

Campaign Process



Ambassadors – Extending Invites

The Ambassador role is to help engage the community and enlarge the circle of influence by connecting LifeWise with contacts. During the Campaign, Ambassadors focus on inviting individuals to read through the LifeWise Strategic Plan and provide feedback. Remember the following four steps: “list, say, secure, relay.”

- 1. LIST** the Contacts
 - ◆ Namestorm individuals or couples in your network
- 2. SAY** the Script
 - ◆ Calling, texting or in-person communication is preferred
- 3. SECURE** the Commitment
 - ◆ Simply secure the commitment to review the plan and their availability to meet with someone from the team in the next two weeks
- 4. RELAY** the Information
 - ◆ Pass along responses to the LifeWise Director or Campaign Chairperson including contact info, availability for the follow-up meeting and any notes from the interaction

Ambassadors use this document - [Campaign Resources: Ambassadors](#) to guide them through their role..

Board Members – Conducting Feedback Interviews

Community involvement is critical to a successful Campaign. Through feedback interviews, Board members will seek the advice of community members about the local LifeWise vision. As Scripture says, “Plans fail for lack of counsel, but with many advisers they succeed” (Proverbs 15:22).

6 R's for Successful Feedback Interviews

1. **Research:** Before meeting with a prospective donor, it is important to do a little research to understand who they are and what might interest them most.
2. **Report:** Don't just jump right into the study and interview. It's important to connect on a personal level.
3. **Read the Interview Guide Script:** When going through the interview, stick to the script.
4. **Record:** As participants provide feedback, make sure to record their responses on the provided interview guide.
5. **Recite the Ask:** At the end of the interview, the interviewer should put away the feedback meeting guide to signify that the questions have concluded. Then, they should clearly articulate the ask to join the Ambassador Team.
6. **Report:** The results of the interview should be communicated to the Program Director for follow up and next steps. This can be done through email or with photos of the completed interview guide.

Board Members use this document - [Campaign Resources: Board Members](#) to guide them through their role.

Directors – Managing the Process

The Program Director (or Campaign Chairperson) is responsible for managing the entire Campaign process, including delegating tasks to Board members and Ambassadors and ensuring progress is made weekly. The primary responsibilities of the Campaign Chairperson include:

- ◆ Refining the Strategic Plan
- ◆ Training the team on the Campaign strategy
- ◆ Maintaining the Campaign Spreadsheet
- ◆ Scheduling and leading regular Ambassador Team meetings
- ◆ Following up to clarify pledges

The Program Director and/or Campaign Chairperson should complete the Campaigns training course and review the resource linked below.

Directors/Chairs use this document - [Directors – Managing the Process](#) to guide them through their role.

STRATEGY TWO: LIFEWISE 101s

What is a LifeWise 101?

A LifeWise 101 is a “point of entry” event. It’s an informational session designed to give community members an overview of the local operations and impact of the LifeWise program.

A LifeWise 101 is not a fundraising event and will not include a donation request, so it is a great point of entry for anyone interested in learning more. While there is no donation request, the 101 can play a major role in sparking and nurturing relationships with potential donors and volunteers.

It is recommended that you start holding LifeWise 101 events as soon as possible after going live.

Materials Needed

- ◆ [Ambassador Team Template](#)
- ◆ Customizable [Budget](#) and [Home Team Giving Levels](#)
- ◆ [101 Contact Cards](#)
- ◆ [101 Invite Jotform Template](#)
 - ◇ Make a clone of the Jotform and update the program name, venue, address and time. In Settings, update your program name in the title and change the email in "Notification 1" to your program's group inbox.
- ◆ [Basic Slides Template](#)

The Players

There are three key people you’ll need for a successful 101:

- ◆ **Ambassador:** The Ambassador brings the people! Ambassadors invite their contacts to the 101. During the event itself, this person will give brief opening and closing statements and/or prayer.
- ◆ **Tour Guide:** This person will give an overview of the 101 and guide people through the agenda, keeping everything organized and on time. The Program Director typically acts as the tour guide.
- ◆ **Teacher:** Since our teachers are on the frontline of LifeWise, it is highly impactful to have a teacher address your guests.
- ◆ **Volunteer:** Since volunteers are right behind our teachers on the frontline, having a volunteer address your guests can be very effective.

The Guests

Ambassadors should invite anyone and everyone, especially those they think could be potential funders or connectors. Ambassadors may consider guests with similar careers, interests or backgrounds to the same 101. For example: local pastors, Bible studies, coworkers, financial advisors, parents, school board members or administrators, etc.

The Flow (The Seven Step Ask)

Why, What, How

Some guests may be entirely new, so take a few minutes to cover the basics of the “Why” (the need), the “What” (released time) and the “How” (LifeWise).

Where We’ve Been

You'll spend the majority of your time here, telling guests the story of your local program. Give your guests some local history, including:

- ◆ How you heard about LifeWise and released time religious instruction and caught the vision to reach public school students with the gospel during school hours
- ◆ How God worked in your community to open doors and put pieces and people in place to start or support your LifeWise program

Share stories on how LifeWise has impacted your:

- ◆ **Students:** Most effective when shared by a Teacher
- ◆ **School:** The Teacher, Volunteer, Tour Guide or Director can share a story they've heard from a School Administrator
- ◆ **Community:** Most effective when shared by a Volunteer
- ◆ If possible, take some time here to allow your guests to experience the program by observing students entering or exiting the classroom or by sharing video footage of your classroom

Where We're Going

During this section of the 101, keep in mind that the bigger the vision, the better! Share some current statistics regarding the number of classes your program holds per week, the number of students enrolled and the percentage of students who participate in relation to the total student body in the grades you serve.

Let guests know about the following (if applicable):

- ◆ Plans for expanding to more grades
- ◆ Plans for additional local staff
- ◆ Plans for facility improvements:
 - ◇ Renovations or improvements
 - ◇ Maintenance
 - ◇ Plans for a custom build
- ◆ Other communities in the local area which have caught the LifeWise vision

What It's Going to Take to Get There

Clearly articulate the personnel and financial needs of the program.

The Ask

Tell guests that someone will be reaching out within the next week to get the guests' feedback. Consider saying "Our only request is that you take our call. We'd really love to get your feedback."

The Ambassador should thank guests for coming and share how starting and sustaining a LifeWise takes people, volunteers and prayer.

The Invite

Sample Invite Script

Use this sample script as a template for your 101 invite:

On [DATE/TIME], we are going to hold a "LifeWise 101" event at LifeWise [PROGRAM]'s facilities. LifeWise 101 is a one-hour informational session designed to give community members an overview of the operations and impact of the LifeWise program.

We hold these sessions regularly as a way to share the LifeWise vision and grow our circle of influence in the community. These events will not include a donation request.

Would you be willing to join us on [DATE]? It's invite-only and designed for 10-15 people.

Please let me know if you can attend.

Sample Reminder

Once you have a guest list send out a second email 2-3 days before the 101, giving additional details regarding location, parking and social time. Here is an example:

Looking forward to seeing you at our facilities this Thursday, February 27th! Here are the finer details:

- ◆ The event will begin and end at Smallville Church. Please park in the church parking lot and enter the south door,
- ◆ You are welcome to join us for coffee and light refreshments in the foyer beginning at 7:45 a.m. The event itself will begin promptly at 8:00 a.m. and end at 9:00 a.m.

Please don't hesitate to contact me if you have any questions.

Looking forward to seeing you soon!

NOTE: We still intend to hold the 101 in the event of a snow/weather delay. However, if we need to cancel in the event of extreme weather, we will notify you by 6:30 a.m. via phone/email.

The Agenda

Sample Agenda

This agenda is for a 60-minute 101. The general outline can be used any time, place or season and does not include social time (which is highly recommended).

Opening – 4 min

- ◆ Ambassador
 - ◇ Welcome and thank guests for coming
 - ◇ Personal introduction
 - ◇ Briefly explain how you got connected with LifeWise
 - ◇ Share how you see released time as the greatest missed opportunity of local churches to reach the next generation
 - ◇ Share how the purpose of the 101 is to enlarge our circle of influence in the area
 - ◇ Encourage guests to be thinking about others who might like to come to a 101
 - ◇ Opening Prayer
 - ◇ Introduce Tour Guide (Program Director)

Overview – 5 min

- ◆ Tour Guide
 - ◇ Personal introduction
 - ◇ 101 Agenda
 - ◇ Guest introductions
 - Share name and who invited you

WHY, WHAT and HOW – 5 min

- ◆ Tour Guide – brief summary

Where We've Been – 25 min

- ◆ **Ambassador, Tour Guide or Leadership Board Member:** Local History – 5 min
- ◆ **Tour Guide:** Introduce Teacher – 1 min
- ◆ **Teacher:** Student Impact – 7 min
- ◆ **Tour Guide:** Introduce whomever will share a story of impact on the School – 1 min
- ◆ **Ambassador, Tour Guide or Leadership Board Member:** School Impact – 5 min
- ◆ **Tour Guide:** Introduce Volunteer (if applicable) – 1 min
- ◆ **Volunteer:** Community Impact – 5 min

Where We're Going – 5 min

- ◆ **Ambassador, Tour Guide or Leadership Board Member** – 5 min
 - ◇ Program Stats
 - ◇ Facility Plans
 - ◇ Regional Expansion
 - ◇ The broader LifeWise movement

What It's Going to Take to Get There – 1 min

- ◆ **Ambassador, Tour Guide or Leadership Board Member**
 - ◇ Expanding the circle
 - ◇ Fundraising needs

The Ask – 1 min

- ◆ **Ambassador, Tour Guide or Leadership Board Member**
 - ◇ Inform guests about the follow-up call to get feedback and talk about how they can get connected to LifeWise
 - ◇ Ask guests to think about others who might want to experience a 101 and get involved with LifeWise

Q&A – 5 min

- ◆ **Ambassador**

Dismissal – 4 min

- ◆ **Ambassador**
 - ◇ Thank guests for coming
 - ◇ Remind guests about the follow-up call to get feedback and talk about how they can get connected to LifeWise
 - ◇ Ask guests to think about others who might want to experience a 101 and get involved with LifeWise
 - ◇ Pray
 - ◇ Dismiss guests

NOTE: This general outline has 10 minutes of flex time which can be used in a number of ways (e.g., showing the video on lifewise.org).

Miscellaneous Tips

- ◆ Pray for the 101 and for your guests before the event

- ◆ Systems check all multimedia before the 101 begins
- ◆ Hold your first 101 with people already connected to LifeWise, friends and family, so they can give you feedback and help you improve the event. Think of it like a 101 Dress Rehearsal!
- ◆ Wrap up in 60 minutes (or within whatever time you committed to taking)
- ◆ Make sure your guests leave with some information (Brochure, Recap Card, Business Card, etc.)
- ◆ Collect information from your guests if not already known (e.g., email and phone are key)
- ◆ Provide breakfast or lunch for your guests if your 101 happens during typical eating times
- ◆ Provide light refreshments during other times of the day

The 101 Follow-Up Call

Make this call within 1-2 business days after the 101. There are just three things to say on every call:

1. *“Thank you for taking the time to attend our 101! It means a lot!”*
2. *“We would love to get your feedback about what you saw and heard. So, what did you think?”*
3. *“Could you see yourself getting involved with LifeWise in some way?”*

The attendee will likely say, *“Yes, but I don’t know what that would look like,”* or *“What are ways I could be involved?”*

The best response would be, *“There are a few ways you could be involved. Would you be willing to sit down with me over coffee or a meal sometime in the next week or so to chat about it?”*

Ultimately, the goal of this follow-up call is to secure an in-person meeting.

If leaving a voicemail, use the following script: *“Hi, [NAME], this is [NAME] with LifeWise Academy. I wanted to give you a call to say THANK YOU for joining us for the 101. I would love to get some feedback from you. Would you be able to give me a call back at [NUMBER]? Again, this is [NAME] at [NUMBER]. I look forward to chatting with you!”*

The In-Person Follow-Up Meeting: Outline

1. Thank them for taking time to meet
2. Find out when they need to conclude and allocate time to the following topics accordingly. **DO NOT GO OVER TIME.**
3. **Build the Relationship**
 - ◆ Just talk with them. Get to know them.
 - ◆ Focus on asking them questions. Learn their story. Learn about their family. Hear about their passions. Do not launch in, talking about LifeWise right away. Even if they go there immediately, you can say something like, *“I’m really excited to talk about LifeWise, but before we do, I’d kind of like to get to know you better. Can you tell me a little more about your story?”*
 - ◆ Share a bit of your own story and tie it in with why you are so passionate about LifeWise. CAUTION – Time can easily get away from you when sharing your story.
4. **Ask for additional feedback on the 101**
 - ◆ “I know we chatted about it on the phone, but do you have any other feedback about what you heard at the 101?”
 - ◆ “How do you think we could improve that event in the future?”
5. **Talk about their involvement**
 - ◆ Describe some volunteer opportunities
 - ◆ Walk through and give them an [Ambassador Team Template](#)

- ◆ Show and give them Budget
- ◆ Show and give them Home Team Giving Levels
- ◆ Ask them to give and LET THEM RESPOND
 - ◇ They will likely say they'd like time to think about it and talk to their spouse
 - ◇ If they say they'd like to host a 101, ask about a date that works for them
 - ◇ If they commit to donating on the spot, explain how they can give
- 6. **Ask if you can follow up in a week**
 - ◆ If they commit to donating on the spot, they will still likely need a reminder to actually follow through
 - ◆ Reminding them of their commitment is not offensive
 - ◆ This follow-up will help remind you to thank them again for their commitment or actual donation
- 7. **Thank them for their time and say goodbye**

STRATEGY THREE: CHURCH PRESENTATIONS

Purpose

Church presentations allow you to spread the word about LifeWise and lead people into the other major trust-raising strategies. These services build support over time by securing smaller, recurring donations that provide sustained financial support.

Materials Needed

At minimum, you will need:

- ◆ [LifeWise retractable banner](#)
- ◆ [Basic Slides Template](#)
- ◆ [Pledge Cards](#)
- ◆ [Bible Education Brochures](#)

You may also consider bringing the following items:

- ◆ [Tablecloth](#)
- ◆ [Program Overview](#)
- ◆ [Volunteer Needs Bulletin Insert](#)
 - ◇ Only bring if recruiting volunteers is an urgent need

Scheduling

- ◆ Ask for 10 minutes on Sunday morning to give an update on LifeWise
 - ◇ You should already have a relationship with the church
 - ◇ Consider offering to give a short devotion related to the LifeWise vision
 - ◇ Try to secure time at the end of the service, if possible
- ◆ Ask if it is okay for you to “give families the opportunity to sign up for the newsletter, learn about volunteer opportunities, enroll their students and/or support the ministry financially.”
 - ◇ Use these words. Be clear about what you are asking.
- ◆ Be clear that this is a “no pressure” ask. The opportunity will be presented, and every family is free to support, or not, as they are led.
- ◆ Ask about the use of A/V in the service. Let the church know you will show slides and a video with sound.
- ◆ Ask for recommended attire
- ◆ Ask if there are other events on the schedule to avoid getting lost on special days

Preparation

- ◆ Edit the [Basic Slides Template](#) and practice several times in the week(s) leading up to the presentation
 - ◇ Time yourself to make sure you stay in the allotted time
 - ◇ Record yourself and review for improvements. This is a painful process but it’s the best way to improve
 - ◇ Present to a small group of your team as a test run

The Day-of Checklist

- ◆ Arrive one hour early
- ◆ Make sure your A/V works

- ◆ Set up your table
 - ◇ Focus on excellence. Make it visually appealing, professional and on brand.
 - ◇ Set up the table with the resources listed in the “Materials” section above (LifeWise retractable banner and Bible Education brochure)
 - Consider also bringing a LifeWise tablecloth, the Program Overview and other marketing items
 - Consider including some recap cards in your display
 - ◇ Use approved [Pledge Cards](#) found on the Storefront. Talk to your Advancement Representative about ordering these from the Support Center.
 - ◇ Provide stamped and addressed envelopes at the table for donors to send a voided check. Attach a sticky note with the reminder that it is “for sending a voided check.”
 - An automated monthly gift is recommended
- ◆ Arrange for the Pledge Cards to be passed out during the video part of the presentation to help your audience focus on the presentation and the ask
 - ◇ DO NOT let the cards be placed in the bulletin or be distributed before the video. This will short circuit your ask.
 - ◇ DO NOT accept a “love offering” during the service. Let the church leader(s) know that the cards serve the role of a love offering.

Presenting

General Principles

- ◆ Be brief
- ◆ Be funny, if you can (Don't force it)
- ◆ Be sincere
- ◆ Be clear with the request

Tips

1. Use approved slides
 - ◆ Slides are available at lifewise.org/basicslides
 - ◆ Delete the first slide, titled “Read First,” before you present
2. Have the title slide on the screen as you walk up to the stage
3. Stick to the seven-step ask script
4. Show the video
5. Arrange ahead of time for response cards to be distributed during the video
 - ◆ Avoid distributing the cards before you present
6. Walk through the response cards
 - ◆ Walk through each step in painstaking detail
7. Stress that giving to LifeWise should only be above and beyond, not in the place of, regular giving to the local church
8. Thank the congregation for their time
9. Turn the service back over to the church leaders
10. Be present and visible in the lobby after the service

STRATEGY FOUR: ANNUAL FUNDRAISING EVENT

Disclaimer: *The natural impulse is to focus on fundraising events from day 1. You must resist this impulse. Real fundraising is done one on one through strategies like the Kickoff Campaign. A good fundraising event can be the cherry on top of a robust fundraising strategy. It should not be the main focus.*

General Principles

- ◆ It's a giant vacuum to clean up dangling opportunities
- ◆ Use table hosts to fill it – recruit all invested individuals
- ◆ Consider a meal – dinner or lunch
- ◆ Execute with excellence – keep it classy, consider a favor
- ◆ It's a 101 on steroids – same general flow
- ◆ Showcase the impact – share the best stories
- ◆ Clarity, clarity, clarity with the ask – it can all fall apart here

Preparation

- ◆ Establish a budget
- ◆ Customize and order invitations and RSVP cards from the storefront
- ◆ Reserve a venue
- ◆ Book a caterer – Provide an estimated headcount up front and a finalized count after RSVPs are collected. Serving alcohol at fundraising events is discouraged.
- ◆ Rent tables, chairs and tablecloths if not provided by the venue
- ◆ Choose centerpieces and arrange for donated items or purchases accordingly

The Players

- ◆ **Presenters**
- ◆ **Table hosts:** these people help create the guest list and track RSVPs. During the event, they will sit and interact with their guests, and oversee the distribution and collection of pledge cards.

The Guests

This is your opportunity to expand your network of support. Each board member, staff person, volunteer and recurring donor has their own unique circle of contacts who could partner with the ministry through financial support. With the table host method, these contacts become a guest list for your event.

Timeline

- ◆ Ask invested individuals to host a table at the event
- ◆ Table hosts namestorm invitees with affinity and capacity to fill seats at their table (1 week)
- ◆ Send invitations 5-6 weeks prior to the event
 - ◇ Include the name and contact information of the table host
 - ◇ RSVPs will be made to table hosts
 - ◇ Follow-up with guests who do not RSVP after 3-4 weeks
- ◆ Table hosts relay RSVPs back to the Director 2 weeks prior to event

The Agenda

Sample Agenda

Opening – 4 min

- ◆ Presenter
 - ◇ Welcome and thank guests for coming
 - ◇ Personal introduction
 - ◇ Briefly explain how you got connected with LifeWise
 - ◇ Share how you see released time as the greatest missed opportunity of local churches to reach the next generation
 - ◇ Opening Prayer

Serve Food

WHY, WHAT and HOW – 5min

- ◆ Presenter – brief summary

Where We've Been – 25 min

- ◆ Introduce additional speakers (Teacher, Leadership Board Member, Volunteer, etc.)
- ◆ **Presenter:** Local History – 5 min
- ◆ **Teacher, Volunteer or other speaker:** Student Impact – 7 min
- ◆ **Presenter:** Introduce whomever will share a story of impact on the School – 1 min
- ◆ **Presenter:** School Impact – 5 min
- ◆ **Presenter:** Community Impact – 5 min

Where We're Going – 5 min

- ◆ **Leadership Board Member, or other speaker** – 5 min
 - ◇ Program Stats
 - ◇ Facility Plans
 - ◇ Regional Expansion
 - ◇ The broader LifeWise movement

What It's Going to Take to Get There – 2 min

- ◆ **Leadership Board Member, or other speaker**
 - ◇ Expanding the circle
 - ◇ Specific monetary needs

The Ask – 5 min

- ◆ **Leadership Board Member**
 - ◇ Direct guests to the pledge cards at their tables
 - ◇ Walk through everything on the pledge cards as a group
 - ◇ Ask them to fill out the pledge cards and place in the envelope on the table

Dismissal – 4 min

- ◆ **Ambassador**
 - ◇ Thank guests for coming
 - ◇ Pray
 - ◇ Dismiss guests