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The FOCUS Group believes that building relationships with donors over time is at the very core of the fund raising process. An ongoing relationship gives the donor the opportunity to play a significant part in the advancement of causes he or she believes in. To maximize the donor's impact, a nonprofit must know the donor. That is, know who the donor is, what kinds of roles he or she might play, when they can give and when they can't, and when they can volunteer and when they can't.

Nonprofits need to take donors seriously. Not just when asking them to give, or inviting them to an event or recruiting them to volunteer. Donors need to be taken seriously from the initial contact and throughout their lifetimes.

Since 1982 **The FOCUS Group** has counseled nonprofits across the US and Canada in ***Taking Donors Seriously®***.

FOCUS works with clients in:

defining their case in the most authentic and motivating way,

identifying leadership and prospects who truly care about the cause and the case for support,

crafting strategies based on the identified leadership and prospects, and

formulating a plan to carry out the strategies.

Some of the characteristics clients mention in describing **The FOCUS Group** include: *high integrity, principle-based, creative out-of-the-box strategists, people who know their craft, system specialists, marketing oriented, and technologically savvy*. **FOCUS** challenges clients to think in fresh and creative ways about their missions and programs and to use ingenuity in working with donors. In working with clients, **FOCUS** endeavors to apply the best available technology and the marketing expertise that enable clients to demonstrate to donors how they – the donors - can achieve their philanthropic objectives.

FOCUS serves clients whose missions range from higher education, secondary and elementary schools, to agencies serving the indigent, the disadvantaged and the disabled, to youth, mission, and arts organizations across the US and Canada. The goal is to provide the highest quality of service, giving clients the greatest value now and over time.

Clients of **The FOCUS Group** are listed in this brochure and prospective clients are encouraged to call them for candid appraisals of our services.

The FOCUS Distinctives

Emphasizing the basics of development

FOCUS works with clients to articulate the Case for giving, develop leadership, clarify and grow a prospect list, develop strategies, and build a plan. **FOCUS** sticks with the fundamentals that are grounded in principles and experience learned through advising many campaigns carried out in many different situations.

Streamlining the strategy for success

The FOCUS Group stresses the importance of long-term major donor development. **FOCUS** equips clients to build and maintain lifetime relationships with their major donors. Twenty percent of the donors give eighty percent of the money, and **The FOCUS Group** shows clients how to cultivate special relationships with the top twenty percent of their prospects. Rather than scattering efforts in many directions, this approach gets the results clients need, using a manageable process. Rather than creating work for clients, **FOCUS** helps clients eliminate ineffective activities.

Defining the challenge with clarity

The FOCUS Group promises integrity. Frequently, consultants must ask hard questions or give counsel that is not particularly welcomed. Clients do not engage **The FOCUS Group** to tell them what they want to hear. They expect **FOCUS** to give accurate analyses and recommend effective strategies.

Sticking to the job with enthusiasm

Stories abound of consultants who are very present during the cultivation of clients and early in campaigns when the big gifts usually come in. Then they appear less frequently when the work gets difficult and campaigns hit the flat places. The clients of **The FOCUS Group** expect professional attention and timely communication. **FOCUS** offers both and continually initiates with clients throughout all aspects of campaigns and projects.

Employing the best of cutting-edge technology

Efficient development departments are key in the nonprofit arena. Donors are concerned about high administrative costs. **The FOCUS Group** invests its resources annually to ensure availability of the best technology. Unlike most firms that outsource services and are not directly involved in applying technology, **FOCUS** knows the latest applications and works with clients in using these tools. In fact, **FOCUS** has developed its own software, *Windshield2000™*, a specially designed system for managing campaigns.

Keeping the horizon in view

The FOCUS Group has had the privilege of long-term working relationships with clients. **FOCUS** takes its clients seriously, keeps its promises, and finishes projects on time. Clients come back for more because **FOCUS** has earned their trust. Clients are encouraged to take donors seriously, and **FOCUS** shows them how to accomplish just that. **FOCUS** enjoys a long and diverse list of repeat clients, some who have been calling on **FOCUS** since the firm was founded in 1982.

The FOCUS Group: Client Services

FOCUS Consultants

Helping Non-profits Raise Capital

FOCUS Consultants is the capital campaign arm of **The FOCUS Group** and conducts feasibility studies to help organizations determine the viability of proposed campaign plans. The feasibility study report gives detailed information about the public opinion of the institution, predicts the potential impact of the case on its constituency, identifies leadership and major donor prospects, recommends a specific financial goal and timetable, and gives direction for launching a campaign based on reality and the promise of success.

After the completion of a feasibility study, **FOCUS** senior staff work with the client to finalize the case, recruit and develop leadership, identify, research, and rate the best prospects, and establish a strategy and a plan. Once a campaign has been successful, **FOCUS** addresses the long-term strategy for building on the new and invigorated prospect pool.

The broad national capital campaign experience of **FOCUS Consultants** for a variety of causes has clearly proven that fundamental principles are at work. Adhering to these principles can ensure success; ignoring them invites failure. **FOCUS** brings this experience and knowledge to confidently guide clients in applying these principles.

A testimonial from Barry H. Corey, President, Biola University

While serving at Gordon-Conwell Theological Seminary, we launched our \$54 million campaign. I knew we needed some help.

We selected The FOCUS Group to come alongside and guide us. Bill Hautt and his team did not bring a superimposed formula. Thoughtfully we walked through the challenges with focus and discipline, wisdom and fresh ideas. The personal touch made a huge difference. I trust you will see his firm's giftedness, integrity, experience and wisdom.

And by the way, the end of the story at Gordon-Conwell was that the campaign ended on time, above goal and under budget.

Windshield 2000®

Today's fund raising software focuses on demographics, giving history, tracking donor contacts, and accounting. This data is important but is the "rear-view mirror."

Campaigns need a "Windshield" to know the...

Best & worst case scenarios

Key campaign leaders & their prospect assignments

Key strategies & timing & financial potential

Focused plans with top gift projections, strategies, dates & other key factors
 Total campaign view with risk analysis
 Campaigns need “rear-view mirrors” AND “Windshield2000®” powerful campaign management.

FOCUS on Research- Prospect Research Services

FOCUS on Research maximizes fundraising by honing in on the top prospects among your donors and prospective donors. We create in-depth profiles – a clear, long-range look at silent or active major gift partners for your organization – helping identify which prospects will invest in and be an important part of what you’re doing.

FOCUS on Research “**Wealth Screening**” is a basic screening for large lists of prospects that provides a wealth rating (A, B, C, etc.) for each prospect based on their financial capacity. The cost for this valuable service is only \$2 per prospect up to 1,000 prospects and only \$1 per additional prospect (minimum charge is \$1,000).

FOCUS on Research “**Snapshot**” is a concise look at a donor’s family, education, wealth summary, real estate, private companies, and charitable donations. It’s a low cost and quick solution at a \$150 per prospect. (10-person minimum)

FOCUS on Research “**Biography**” is a thorough look at a donor and his/her family, education, wealth summary, real estate, private companies, and charitable donations. It’s a profile of a person that goes far beyond the data to give the big and full picture. This service is \$450 per prospect. (5-person minimum)

We recommend “**Wealth Screening**” for a large list of prospects and then “**Snapshots**” on the best prospects identified in the screening. After reviewing the “**Snapshot**” reports we recommend a “**Biography**” of your very best prospects to get the complete picture. The cost of individual “**Snapshots**” will be deducted from any “**Biography**” profiles that are ordered.

FOCUS on Research offers the highest quality custom prospect research prepared by experienced consultants without the overhead costs of having a researcher on your payroll. Even medium and small non-profits can compete effectively and affordably with larger non-profits.

- **Wealth Screening** hones in on your best prospects.
- **Snapshots** give a close look at your top prospects.
- **Biographies** give a complete profile and a full view of those individuals who can support your mission at the highest levels.

FOCUS on Foundations- Foundation Services

Nonprofits, when planning to solicit foundations, typically look for a “grant writer.” **FOCUS on Foundations** seeks to broaden a client’s perspective and develop a long-term foundation strategy. **FOCUS** may train a client's staff, develop a foundation department, or partner with a development team that is already in place. Using the most comprehensive and efficient foundation research tools, **FOCUS** crafts a strategy that gives attention to the long-term

vision, proposal development, program packaging, infrastructure development, follow-up and ongoing communication. Just as with major donors, foundation prospects need to be cultivated over the long term.

FOCUS on Foundations is a service to help non-profit organizations develop effective foundation strategies. Each organization is unique and deserves a unique approach in working with foundations. Our goal is to help your non-profit succeed in research, soliciting grants and cultivating long-term relationships with foundations. ***FOCUS on Foundations*** tailors its services to your needs and compliments your staff's skill set.

Taking Donors Seriously® - Training in Fund Raising

Thousands of staff members of non-profits across the country attend countless fund raising seminars, conferences and workshops every year. Most of these participants would readily attest to the value of this training. Yet, the average tenure of professional development staff people is 18 months, and there is no end to expressions of frustration about fund raising by field staff who have to raise their own budgets.

Is there a contradiction here? Possibly not. Fund raising is one of those things that are closer to common sense than theory. Since this is the case, the disparity between the enthusiasm for fund raising training and long-term results may be due to the fact that the training is too far removed from the realities of the streets where the fund raisers walk.

The *Taking Donors Seriously®* seminar is the only training program on the market developed for community nonprofit and local offices of national and regional organizations.

A testimonial from Denny Rydberg, President, Young Life

There was a time in Young Life when fund raising was seen by most as a "necessary evil." Today, however, our staff holds donors in the highest regard and views them as essential partners. Not coincidentally, our change in attitude has been paralleled with a steady and sustained increase in our financial health.

If you chart the transformation in our thinking and behavior, you will find the introduction of Taking Donors Seriously® (TDS) from The FOCUS Group at the fork in our financial road. What seemed like a radical departure from traditional thought years ago, however, has become commonplace in our culture and conversation. That's great news because-while TDS is still radical and refreshing-it is now an integral thread woven through the fabric of Young Life.

A testimonial from Terry Stokesbary, Senior Program Director,
M.J. Murdock Charitable Trust

The M.J. Murdock Charitable Trust is committed to building the capacity and improving the quality of organizations within the non-profit community. The FOCUS Group led by Dr. Bill Hautt, has contributed a great deal over the past six years to this commitment. Each year its training and coaching expertise help selected organizations significantly improve their fund development efforts. The success of The FOCUS Group has led to stronger organizations, which will ultimately mean that the communities in which we live will be better served.

FOCUSed Counsel- Executive Coaching in Advancement

Most CEOs of nonprofits feel the pressure and obligation to raise money. Some like it. Others put it off. Many leaders do not have time to plan or think strategically about their fund raising role. The better they are in fund raising, the more they are expected to do. CEOs know this is not the way to leverage their time or be strategic.

FOCUS has developed major donor concepts that are not commonly recommended, and our clients believe these concepts serve them well. The FOCUS Group's President, Dr. Bill Hautt, has worked effectively with a number of CEOs and tailors his work and recommendations specifically for each client. The leaders he works with believe these strategies are helping them as CEOs maintain a balance between fund raising and their other pressing agenda.

FOCUS on Planned Giving- Deferred Giving Counsel

FOCUS on Planned Giving is a resource for non-profits to identify and secure legacy gifts, often donors' largest single gift. By some estimates \$100 trillion will pass from one generation to the next by 2050.

FOCUS helps non-profits design and implement successful marketing and donor management strategies to secure planned gifts.

Too often planned giving programs operate in silos or on a parallel track outside of the major donor program. **FOCUS** will provide counsel to integrate a planned giving program into the mainstream of clients' fund development operations to achieve greater efficiencies and an increased number of gifts.

Non-profits served by **FOCUS on Planned Giving** will be positioned to achieve a record number of planned gifts in the years ahead.

The Consultants in FOCUS



Bill Haultt, President and Executive Consultant of FOCUS Consultants, is known nationally both in the US and Canada. His undergraduate degree is from Houghton College, his masters from Northwestern University, and his doctorate from Columbia University. His expertise includes major donor strategies, CEO interfacing, creative technological applications, and fund raising training seminars. He has developed two video tape series entitled, *Haultt to Fundraise* and *Taking Donors Seriously®* to train national field staff and volunteers.

He has lectured at the Oxford Center for Mission Studies in Oxford, England and conducted training seminars across the US, Canada, and Latin America. For three years he taught in the Graduate Studies Program at Eastern College in St. Davids, Pennsylvania, in the MBA non-profit management degree program.

Email Bill: bhaultt@tfgrp.net



Brad Layland, Senior Vice President/Senior Consultant, had a distinguished career at Young Life from 1992-2009 serving in various roles within the organization including Field Development Director, Gift Planning Associate, and ultimately the Director of Development. His expertise includes providing fund raising counsel to non-profit organizations, including workshops, marketing and major donor strategies, planned gift

marketing and capital campaign counsel. Brad is highly experienced in our firm's training program, *Taking Donors Seriously®* and Focus on Research.

He has also successfully started and manages a real estate company he owns in St. Johns County, Florida. A 1994 graduate of the University of Florida in Gainesville, he earned a B.A. degree in Communications Studies. He also completed his M.A. in Theology from Fuller Seminary in Pasadena, CA in 2004.

He currently serves as an elder at the Good News Presbyterian Church and as Finance Chairperson of Young Life of St. Augustine, FL. In his spare time he enjoys spending time with his family and training for Marathons.

Email Brad: blayland@tfgrp.net



Ted Rodgers, Senior Consultant, is a respected consultant in fund development and philanthropy. His areas of expertise include major donor development, financial management, strategic planning, board development, and estate planning. He is presently the Executive Director of Russian Leadership Ministries based in Wheaton, IL. Most recently he served as Executive Director of the CT Foundation, an arm of Christianity Today International (CTI). Rodgers was Contributing Editor and Interview Host of the monthly on-line newsletter, *Money & Faith* (www.christianitytoday.com/money) that grew to over 12,000

subscribers in its first year.

With over twenty seven years in private higher education, Rodgers has a breadth of experience in both undergraduate and graduate institutions. Rodgers earned a BA in Economics from Wheaton College (IL) and an MA in Educational Administration from Ball State University (IN). His advanced certifications include the CFRE and the ASCE. He is widely respected as a presenter at professional meetings and has also been a member of several higher education accreditation teams. He is currently a Trustee of two seminaries including the Moscow Theological Seminary in Russia.

Email Ted: trodgers@tfgrp.net



Daniel Tymann, Director of Business Development and Associate Consultant, began his career in non-profit management and fundraising at Cisco Systems in their Office of Philanthropy in 2003 and then in his current position, since 2005, as Executive Vice President for Advancement, Communications and Technology at Gordon College in Wenham, MA. His expertise includes major donor strategies, capital campaigns, corporate giving, foundation grants, and development operations.

He has held engineering and executive positions in AT&T, Lucent Technologies and Cisco Systems from 1981 to 2005. A graduate of Tufts University, he earned a BS degree in electrical engineering. He has served as a consultant, president, treasurer, and board member of non-profits like The Boys and Girls Club of Lower Merrimack Valley, The Triton Regional School Committee, Touched Twice United and Operation Bootstrap Inc. Email Dan: dtymann@tfgrp.net



Angela Vaughan, Senior Research Associate, has worked in prospect research for over fifteen years, including almost ten years as a full-time consultant. She began her career as Research Coordinator at the Colorado School of Mines in Golden, CO. Then she spent three years in Charlottesville, VA as a Senior Researcher for the University of Virginia during that school's billion dollar campaign. She has presented at both the National and Virginia chapter conferences of APRA (Association for Professional Researchers in Advancement) and has published articles in

APRA publications on using the internet for research and on estimating net worth and capacity. Email Angela: avaughan@tfgrp.net

Kate Permuy, Research Associate, joined The FOCUS Group, LLC as a researcher and writer. As a media writer and producer her work has been seen on PBS and in conferences and training sessions in all 50 states. She co-created *Caregiving HELP!*, a video blog and guide on eldercare. Her writing has been published in newspapers in Arizona and Florida. Her clients have ranged from non-profits including PBS to Fortune 50 companies including Bank of America and AT&T. Email Kate: kpermuy@tfgrp.net

Jill Horner, Consultant Associate, supports feasibility studies and *Windshield2000*®. She also maintains our website and works on marketing projects. Email Jill: jhorner@tfgrp.net

Clients Served by The FOCUS Group, LLC

Colleges, Universities, & Seminaries

Belhaven College
Jackson, MS
 Covenant Theological Seminary
St. Louis, MO
 Eastern College
St. Davids, PA
 Gordon-Conwell Theological
 Seminary
S. Hamilton, MA
 New College Berkeley
Berkeley, CA
 University of the Nations
Kailua-Kona, HI
 Oxford Centre for Mission Studies
Oxford, UK
 Regent College
Vancouver, B.C., CAN
 San Francisco Theological Seminary
San Anselmo, CA
 Stanford University School of
 Medicine
 Health Promotion Resource Center,
Palo Alto, CA
 Westminster House
Berkeley, CA

Independent Schools

The Annie Wright School
Tacoma, WA
 Cono Christian School
Walker, IA
 Dublin School
Dublin, NH
 Flintridge Sacred Heart Academy
La Canada, CA
 French Camp and Chamberlain Hunt
 Academies
French Camp, MS
 Immaculate Conception Academy
San Francisco, CA
 Jackson Preparatory School,
Jackson, MS
 Metairie Park Country Day School
New Orleans, LA
 Presentation High School
San Jose, CA

The Piney Woods School
Piney Woods, MS
 Saint Elizabeth High School
Oakland, CA
 Saint Mary's College High School
Berkeley, CA
 The Stony Brook School
Stony Brook, NY

Mission Organizations

Mission to North America
Atlanta, GA
 The Odessa Project
Atlanta, GA
 Presbyterians for Renewal
Louisville, KY
 Village Missions International
Dallas, OR

Social Service, Arts, & Other Client Organizations

CBMC
Chattanooga, TN
 Christian Herald Association
New York, NY
 CityTeam Ministries
San Jose, CA
 Order of Malta Clinic of Northern CA
San Francisco, CA
 Nat'l Historic Trails Interpretive Center
Casper, WY
 San Francisco Ministry to Nursing
 Homes
San Francisco, CA
 Shepherd's Gate
Livermore, CA
 Tacoma Actors Guild
Tacoma, WA

Youth Organizations

Canadian InterVarsity Christian
 Fellowship
Toronto, Ontario, CAN
 F.O.C.U.S.
West Tisbury, MA
 InterVarsity Christian Fellowship
Madison, WI
 Young Life
Colorado Springs, CO

The FOCUS Group, LLC

Current Capital Campaigns & Clients

Young Life, *Colorado Springs, CO*
\$260M for doubling students reached annually to two million

Gordon-Conwell Theological Seminary, *S. Hamilton, MA*
\$64.5M for endowment, facility upgrades, annual fund & planned giving

French Camp Academy, *French Camp, MS*
\$24M for endowment and campus improvements

The Piney Woods School, *Piney Woods, MS*
\$23M for capital/programmatic improvements and endowment

InterVarsity Christian Fellowship, *Madison, WS*
\$20M for expanding to new campuses and renovating camps

Evergreen Freedom Foundation, *Olympia, WA*
\$8.4M for new and expanded programs and endowment

Forward Edge International, *Vancouver, WA*
\$7.3M for facilities, water-health care, & disaster relief

The Stony Brook School, *Stony Brook, NY*
\$7M for new student center and dining commons

Feasibility Studies

Lutheran Theological Southern Seminary, *Columbia, SC*
St. Elizabeth High School, *Oakland, CA*

Other Services

Advancement Counsel

Association of Biblical Higher Education, *Orlando, FL*

Diocese of Oakland, *Oakland, CA*

InterVarsity Christian Fellowship, *Madison, WI*

Nuru International, *Atherton, CA*

Warner Pacific College, *Portland, OR*

Young Life, *Colorado Springs, CO*

Taking Donors Seriously® Training Services

M.J. Murdock Charitable Trust, *Vancouver, WA*